



## **Your Day, Your Way!**

### **SB 1270 Report on Expanding Opportunities and Choice in California's Day Program Services for Individuals with Developmental Disabilities**

**Prepared by the  
California State Council on Developmental Disabilities  
with support from the  
Department of Developmental Services**

**for  
Governor Arnold Schwarzenegger  
and the  
California State Legislature**

**May 2007**

**I would like to work independently on my own . . . and not have a contract hold me back from working at the company I was trained at . . . . and get paid equal. Pay with benefits and medical benefits as well . . . and to clock in and out independently and to be equal as one.**

**SB 1270 Stakeholder Group**

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## Acknowledgements

I am pleased to let you know our SB 1270 Stakeholder Process has been very successful. We have held three large Stakeholder Meetings consisting of consumers, families, providers, regional centers, advocates, state agency representatives and members of the legislature. (A complete listing of Stakeholder Workgroup Members can be found in the appendix.) Each meeting has been extremely informative and productive. Over 100 people attended the first meeting, and about 80-90 the next two meetings. In addition to the Stakeholder Meetings, Area Boards and Regional Centers hosted almost 40 community input sessions all over the state and did a terrific job reaching out to underserved communities. We want to thank everyone who has participated in this process and we appreciate everyone's continued help and support.

We are proud of the participation of the consumer members of the Stakeholder Workgroup. They have been front and center during the entire process. The Department of Developmental Services (DDS) has generously provided consultant support to ensure maximum participation and input from consumers. This has been a huge success! The final report includes an adapted, consumer friendly version, that has been inserted into our Executive Summary as well as a DVD that focuses on how each of our SB 1270 recommendations will personally impact the lives of people in our group and the people they represent.

The Council assembled a dedicated and enthusiastic team to work on this momentous project. Sascha Bittner has chaired each of the three meetings; Marcy Good, Shirley Dove, and Dan Boomer have represented the Council at every stakeholder meeting. Our staff consisting of Tom Montesonti and Dawn Morley from Area Board 1, Dick Robertson from Area Board 2, Michael Rosenberg from Area Board 3, Julie Barnes from Area Board 9, Roberta Newton from Area Board 10, Melissa Corral, Staff Counsel, and Natalie Hannibal, Executive Assistant have been tremendous in their overall support and expertise. Laurie Hoirup and Tammy Torum have been very helpful facilitating many of our small discussion groups at the Stakeholder Meetings. We have also received wonderful support from Phil Bonnet and his staff (particularly Lisa West) at Alta Regional Center that hosted each of our three Stakeholder Meetings. Laura Larson, from Far Northern Regional Center, Omar Noorzad from Tri-Counties Regional Center and Clay Jones from Redwood Coast Regional Center have also been critical to the success of this project. A special thanks to Janet Eaton and Sierra Prine for posting the SB 1270 documents on the Council website.

We have been fortunate to have a team of consultants that have been amazing. This team consists of: Bill Allen, Claudia Bolton, Charlene Jones, and Mark Starford. They have put countless hours into this project.

The State Council wishes to express our gratitude to Senator Chesbro for having the vision and leadership to introduce SB 1270 and to Governor Schwarzenegger and our state legislature for their tremendous support. The Council is very excited about working with the Administration and legislature in making our recommendations a reality.

**Alan Kerzin**

Executive Director

California State Council on

**DEVELOP**mental Dis**ABILITIES**

*"The Council collaboratively advocates, promotes and implements policies and practices that achieve self-determination, independence, productivity and inclusion in all aspects of community life for Californians with developmental disabilities and their families."*

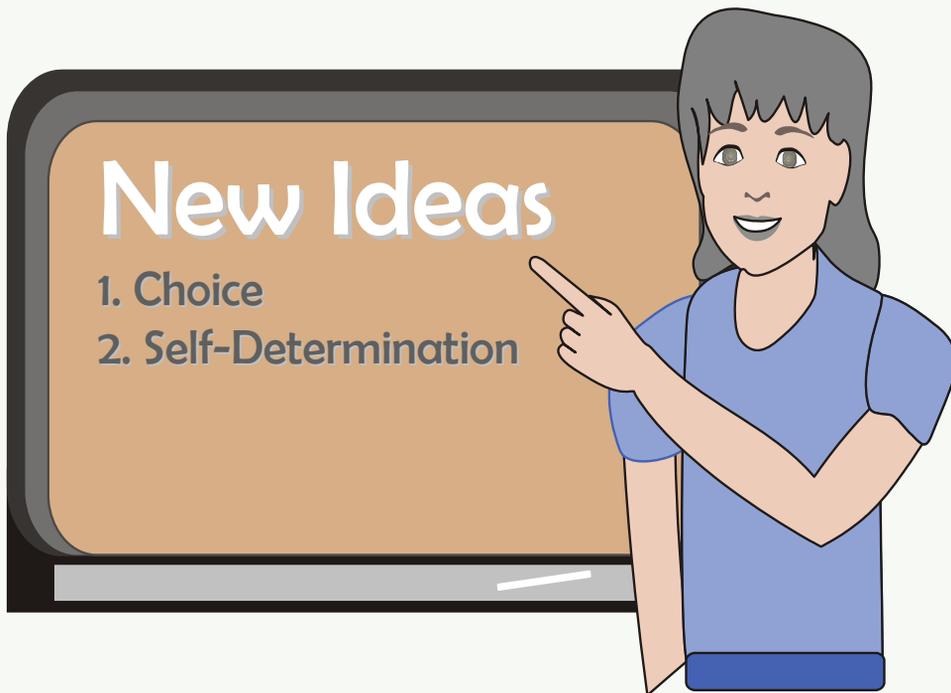
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## **Executive Summary**

The summary on the following pages is an accessible version of the ten recommendations in this report. It was developed so that everyone involved in the stakeholder process can understand it. If you're interested in viewing the accompanying DVD, please contact the State Council for a copy. The report that follows the summary describes: Senate Bill 1270; the stakeholder process for developing the report; a vision for the future and core values used to guide the process; day program use and costs; some examples of best practices in California and other States; and, goals, recommendations, and strategies for reaching the goals.

# Senate Bill 1270

## 10 RECOMMENDATIONS



Adapted recommendations developed by  
SB 1270 Workgroups  
April 2007

# Opening Statement



The State Council on Developmental Disabilities brought people from across California together in SB1270 workgroups to explore ways to expand the quality of life for persons with developmental disabilities. To gather information from stakeholders about improved employment, educational and social activities, the Council made sure voices of persons with disabilities guided discussions and shaped ideas included in this report.

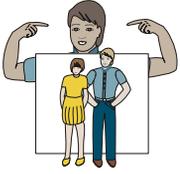


Workgroup recommendations that you are about to read will help thousands of people pave a new road toward a better life. By having more information when coming out of high school transition programs, people have more choices. By having more choices about their futures, people are more empowered. By having good services, people can decide not only where they want to live but what they want to do for work and, maybe, even start their own business.



The 10 recommendations that follow encourage us and open doors for future generations of Californians with developmental disabilities. They are a bridge between us and the community at large. People will see us as contributors. We will show that we can stand on our own two feet and participate in our communities – being good neighbors, helping others, working and paying taxes, and inspire many.

# Major Themes



Choice and Self Direction



Flexible, Individualized Services & Supports



Employment & Health Benefits



Innovation

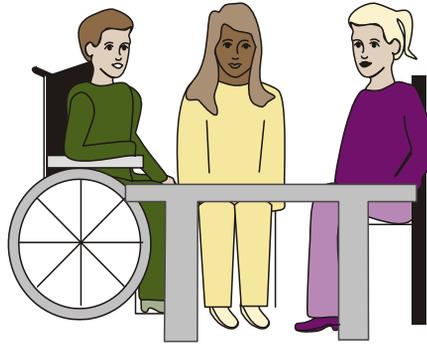


Workforce Education and Training



Community Education & Outreach

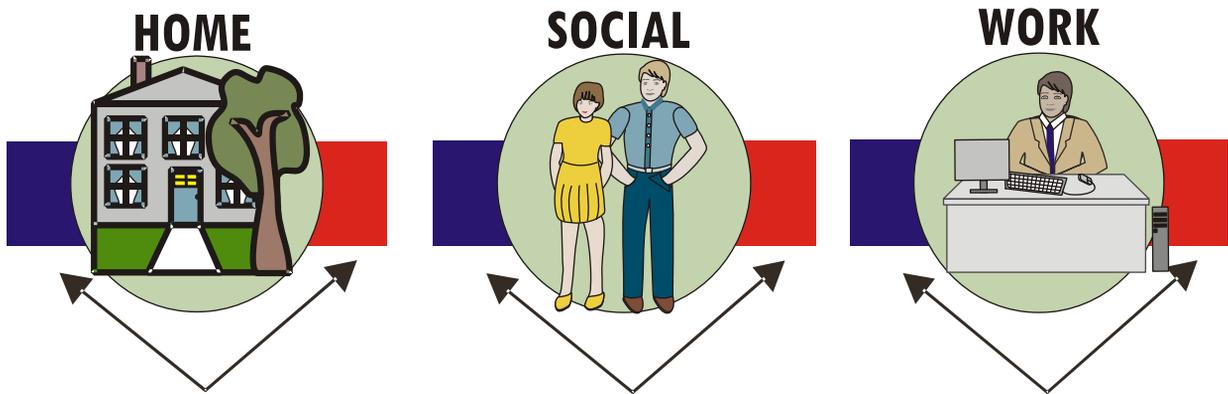
# Recommendation #1



At IPP meetings, make sure people get information they need about their choices, especially:

- Real jobs & working in the community
- Other community activities:  
[volunteering, internships, classes, clubs, etc.]
- Benefits: Social Security, MediCal, Medicare, etc.

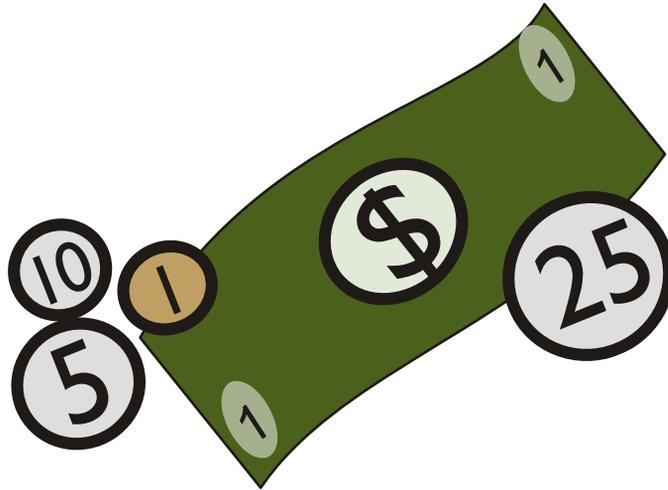
# Recommendation #2



**Start letting (and supporting) people to:**

- Have their own service budgets.
- Decide on services they want.
- Buy their services.

# Recommendation #3



The State Council will ask state agencies like Department of Developmental Services, Education and Rehabilitation to put funding together to help people figure out what to do after high school.

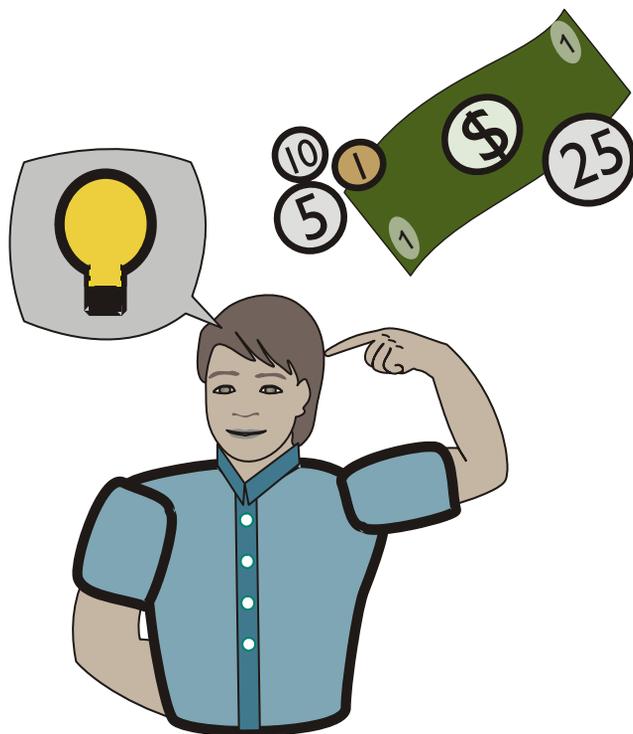
# Recommendation #4



More jobs

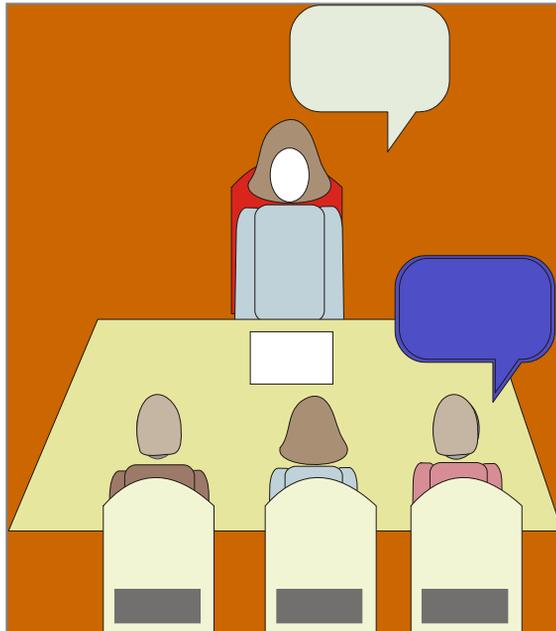
The State Council will ask the State and all employers in California to hire more persons with disabilities.

# Recommendation #5



Help fund individuals who have good ideas about work services and other community services, including persons with developmental disabilities who want to start their own business.

# Recommendation #6

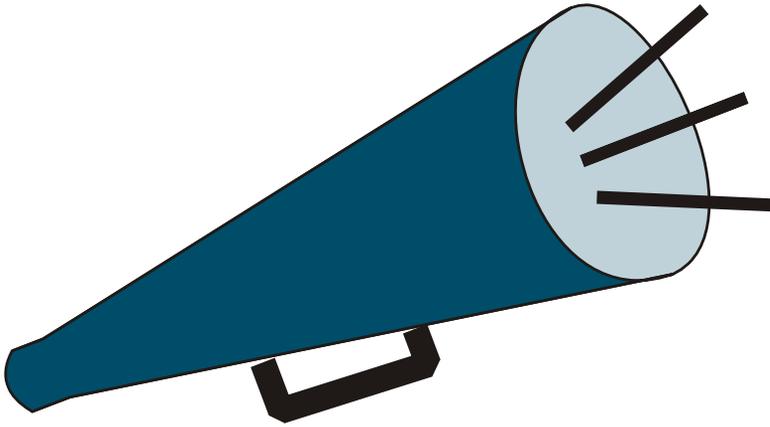


**Make sure support staff get the training they need to do a good job.**

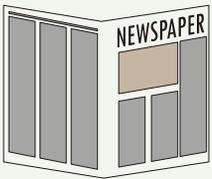
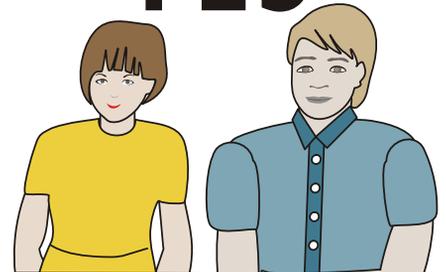


**Put together good trainers from across the state who will help teach staff to understand people's differences and support them better in communities.**

# Recommendation #7

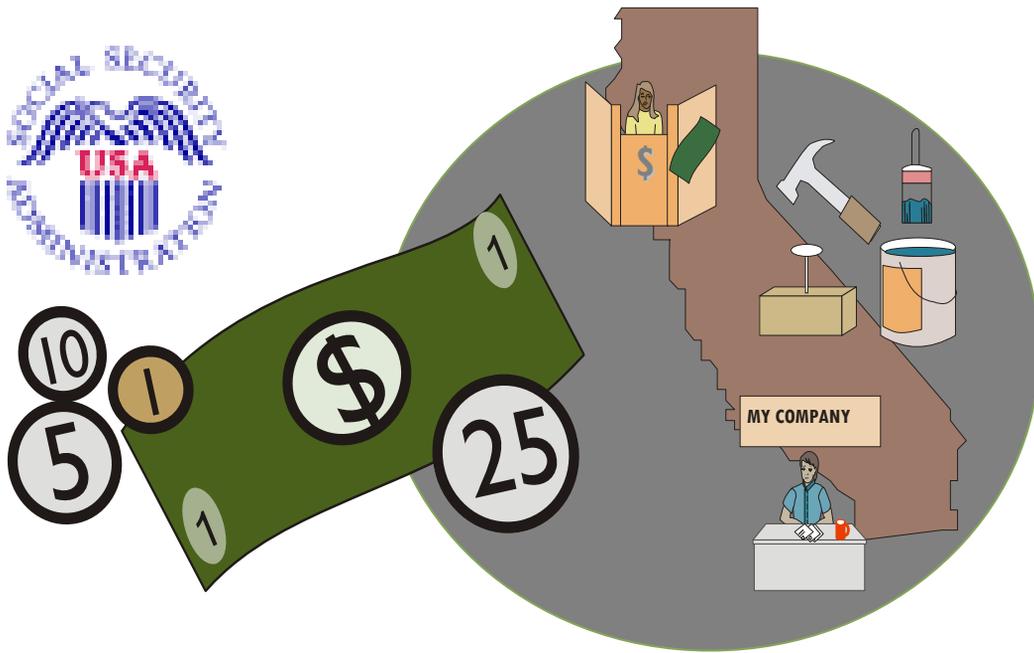


# YES



**Get the word out in a media campaign about persons with developmental disabilities as good employees, neighbors and community members.**

# Recommendation #8



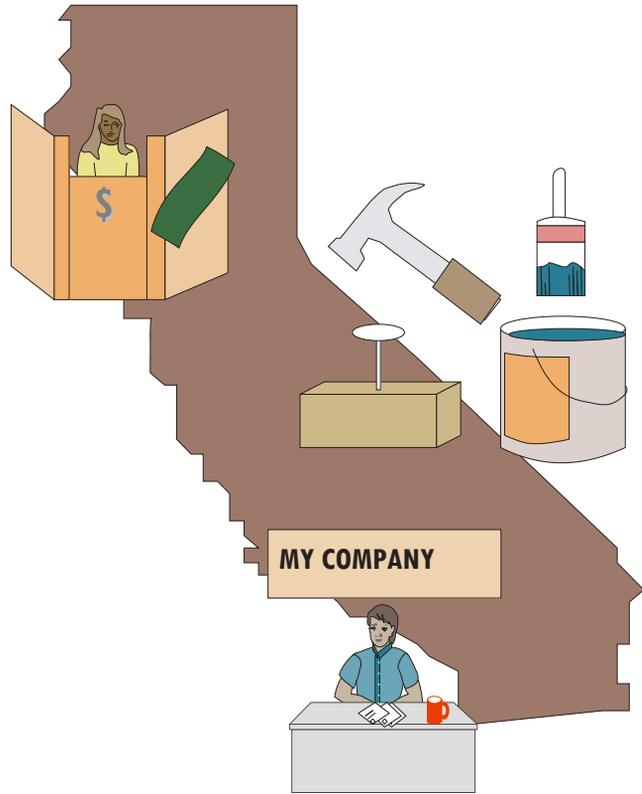
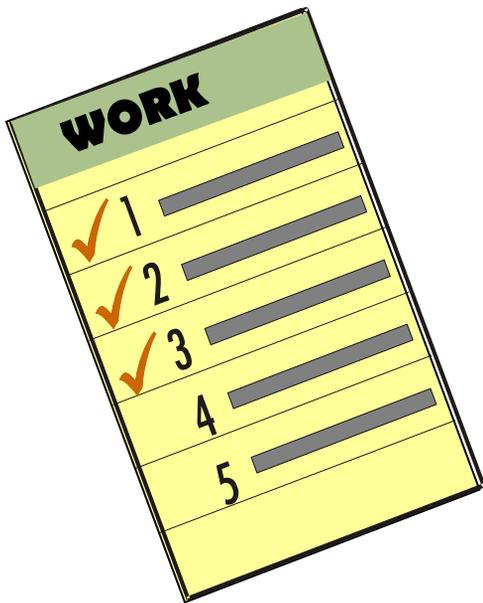
For people who work and get Social Security, let them keep more of the money they earn and health benefits.

# Recommendation #9



Let Regional Centers pay for more services that help people find and keep jobs, and do things in the community like everyone else.

# Recommendation #10



Keep track of the work situations of people and how they are getting into the community.

## Introduction

### Senate Bill 1270<sup>1</sup>

Introduced by Senator Chesbro and principal coauthored by Senator Alquist with Senator Romero, Senate Bill 1270 became law in late summer of 2006. The law directs the State Council, with the support of the Department of Developmental Services, to gather information from stakeholders and to write a report about ideas for different and expanded nonresidential (work, social, recreational, school) opportunities for people with developmental disabilities. The Legislature requested the Council to provide recommendations by May 1, 2007, that support the following goals:

- 1) Expand peoples' opportunities in social, recreational and volunteer activities.
- 2) Expand work opportunities in the community.
- 3) Help make government jobs more open to people with disabilities.
- 4) Increase the use of creative ideas like vouchers, and self-directed services.
- 5) Look at successful models in California and other states.
- 6) Find ways to help make things work better by making some changes to regulations and funding.

### The Stakeholder Process

As the lead agency, the California State Council on Developmental Disabilities convened people from across the State representing commitment and diversity in their field of expertise which included: People First of California, primary consumers of services, World Institute on Disabilities, Protection and Advocacy, Inc., SEIU, University Centers of Excellence, principal consultants to Legislative Committees, Governor's Committee on Employment of People with Disabilities, Independent Living Organizations, Departments of Mental Health, Rehabilitation, Developmental Services, and Education, Disabilities Rights Education and Defense Fund, providers of services, the ARC of California, California's Regional Centers and parents of individuals with developmental disabilities, from across the rich fabric of our State, all brought together to create a vision for the future.

The unique collaboration of our diverse community met on January 9, 2007, to begin the journey of building a vision. Peggy Collins, Principal Consultant to then Senator Chesbro and the Senate Select Committee, as well as Terri Delgadillo, the Director of the Department of Developmental Services spoke at the opening session creating the framework for the workgroups future; it was then, that the work of our community began. In excess of 110 individuals<sup>2</sup> worked more than 2,700 hours over two additional meetings in February and April in creating an initial vision that was

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<sup>1</sup> Actual text of Welfare and Institutions Code 4678 can be found in Appendix A.

<sup>2</sup> A listing of members of the Stakeholder Advisory Group can be found in Appendix B.

reviewed, challenged and revised in more than 39 local grassroots meetings held across the State in which Area Boards in partnership with Regional Centers sought local input from their communities. Public meetings accounted for an additional 300 individuals who worked more than 750 hours in community meetings questioning, revising, debating as well as visualizing the future. Also, over 325 people with disabilities, seniors, family members, organizations and other advocates across California participated in the California Disability Community Action Network Townhall Telemeeting on SB 1270 in late March.

In each step the State Council facilitated SB 1270 Stakeholder Workgroup Preparation Meetings, in which consumer members of the Workgroup further discussed and clarified their input. The preparatory meetings preceded each statewide task force meeting. The information developed for the preparatory meetings was also used in the general community meetings conducted by Area Boards and Regional Centers. Additionally, the State Council and Area Boards posted to their websites a survey in which more than 100 individuals provided responses, enhancing further the quality of the vision.

Finally, the State Council has provided briefings to numerous bodies including the Department of Developmental Services, the Legislature, Association of Regional Center Agencies, Health and Human Services, as well as numerous other groups. In each instance, the Council viewed the opportunity as a two-way venture, sharing a vision and seeking input.

### **Core Values**

On January 9<sup>th</sup> 2007, in Sacramento, the stakeholder workgroup started work on recommendations for the SB 1270 report to the Legislature. At that meeting, stakeholders were asked to share their hopes and dreams. The major themes from those discussions are listed below and are the core values reflected in the final recommendations:

#### *Choice and Self-Direction*

**Individuals choose how they want to participate in their local communities and those who want to work, have a job they choose.** All individuals have a way to communicate their preferences and needs. There is assistive technology to support individualized communication. Individuals have opportunities to make choices about community participation and relationships that reflect their lifestyle, cultural, language, and spiritual preferences. Individuals travel, vacation, go to school or college, join clubs, date and marry, and watch and play sports. They participate in their local communities like everyone else, during the day, evenings, and weekends and by themselves or with a group.

People with developmental disabilities work everywhere that everyone else works. They have opportunities to learn about work through volunteering, internships and

work experience programs. They work full time, part time, on weekends, and close to their neighborhoods. They work at jobs that match their interests and talents. Individuals work for minimum wage or higher. They work in private companies and for local, state, and federal government agencies. They are service providers. They have their own businesses. When they're ready, they retire.

*Flexible, Individualized Services and Supports*

**There is a system of support for individuals who want to participate in their communities and who want to work.** There is community, social, and on-the-job support, when and where it's needed. It is appropriate to cultural and language preferences. Support includes friends, peers, and family as well as people who are paid. The system of support includes transportation and housing. Funding for support is flexible and it starts before individuals leave high school. As needed, paid support helps individuals try new community activities, join organizations, visit friends and family, and find and keep a job.

*Employment and Health Benefits*

**Individuals understand their employment and health benefits.** Individuals and their families start learning about work and health benefits while they're still in school, before they graduate. There are people who help individuals and their families understand their benefits and who help them with benefit planning. People with developmental disabilities and their families understand how work affects Social Security and health benefits. They know the difference between the myths and the truths. Social Security laws are changed so that individuals have an opportunity to build assets.

*Innovation*

**Good ideas are rewarded and shared.** There are incentives for service providers who help people expand their opportunities for community participation and get and keep jobs that they choose. There are incentives for creative and innovative employers who hire people with developmental disabilities. There is technical support and funding for individuals with developmental disabilities who want to start their own businesses. Individuals, family members, service providers and employers have ways to share what they learn about successful ways to expand community participation and employment.

*Workforce Education and Training*

**People who are paid for their support are well trained and make a living wage with benefits.** They know and understand the culture and the language of individuals they support. Staff are knowledgeable about community resources and employment opportunities and know how to support individuals in social and recreational activities, volunteer and paid work. There is funding and incentives for

ongoing education. Statewide training efforts are expanded to include staff who provide work and community participation services and supports.

*Community Education and Outreach*

**Communities understand that people with developmental disabilities are good friends, neighbors, citizens, and fellow workers.** There is ongoing, statewide community and employer education that includes individuals with developmental disabilities as teachers. Outreach is through public speaking, school curricula, and all types of print, television and Internet media.

## Brief Overview of California's Day Program Services

### Introduction

Title 17 states *"community-based day programs" means those programs which provide services to individuals on an hourly or daily basis, but less than a 24-hour basis in the community rather than at a developmental center. Only the following types of services are community-based day programs: activity centers, adult development centers, behavior management programs, independent living programs, infant developmental programs and social recreation programs.*

As defined on the Department of Developmental Services (DDS) website, day programs are . . .

“. . . community-based programs for individuals served by a regional center. They are available when those services are included in that person's Individual Program Plan (IPP). Day program services may be at a fixed location or out in the community.”

The DDS website further indicates that the types of services available through a day program include:

- Developing and maintaining self-help and self-care skills.
- Developing the ability to interact with others, making one's needs known and responding to instructions.
- Developing self-advocacy and employment skills.
- Developing community integration skills such as accessing community services.
- Behavior management to help improve behaviors.
- Developing social and recreational skills.

Transportation services are often provided so persons with a developmental disability may participate in day programs and/or other activities identified in the IPP. A variety of sources may be used to provide transportation including: public transit and other providers; specialized transportation companies; day programs and/or residential vendors; and family members, friends, and others. Transportation services may include help in boarding and exiting a vehicle as well as assistance and monitoring while being transported.

In addition, the Work Services Program (formerly Habilitation Services) addresses the vocational needs of persons with developmental disabilities through a broad range of services directed toward developing the individual's maximum potential for mainstreaming into generic vocational rehabilitation programs. The Work Services Program provides both sheltered workshop services through Work Activity Programs and supported employment services. Work Services are available only to persons with developmental disabilities who are also Regional Center clients.

A Person-Centered Planning approach is optimally used in making decisions about where a person with developmental disabilities will live and the kinds of services and supports that may be needed. In person-centered planning, everyone who uses regional center services has a planning team that includes the person utilizing the services, family members, regional center staff and anyone else who is asked to be there by the individual. The team joins together to make sure that the services that people are getting are supporting their choices in where they want to live, how and with whom they choose to spend the day, and hopes and dreams for the future.

## **Day Program Use, Costs and Other Considerations**

**Current costs for day programs, transportation and other non-residential services.** The summary below is based on the total outlays for State Fiscal Year 2005-06 across three broad service categories: (1) Day Programs, (2) Transportation, and (3) Other Non-residential Services. Of the \$1,755,233,225 spent that year, using these three service categories, 42.7% was for Day Programs, 10.4% for Transportation, and 47.0% for Other Non-Residential Services. To better understand and explain service outlays, Service Codes were reclassified (especially from Other Non-Residential to Residential). As a percentage of the \$1.8 billion total, Day/Employment does not change much, nor does Transportation. Other Non-Residential, however, drops from 47.0% to 30.4%, largely because some of the outlays in DDS's Other Non-Residential category have been reclassified "Residential." Here are the reclassified "Residential" Service Codes with millions of dollars spent in SFY05-06 shown in parenthesis:

- 520, Independent Living Program (\$65.3 million)<sup>3</sup>
- 635, Independent Living Specialist (\$3.1 million)
- 020, Transition/Set-Up Expense (\$0.1 million)
- 022, Motel (\$0.2 million)
- 065, State Supplementary Payment Restoration (\$6.9 million)
- 073, Parent Coordinated Supported Living Program (\$1.5 million)
- 074, Out-of-Home Respite—Acute Care Facility (\$0.1 million)
- 092, Affordable Housing Coordinator (\$0.3 million)
- 093, Parent-Coordinated Personal Assistant Services (\$3.0 million)
- 101, Housing Services (\$2.4 million)
- 104, Environmental Accessibility (\$0.7 million)
- 856, Home Health Aide (less than \$0.1 million)
- 858, Homemaker (less than \$0.1 million)
- 860, Homemaker Services (\$7.7 million)
- 868, Out-of-Home Respite Services (\$4.1 million)
- 894, Supported Living Service Vendor Administration (\$4.2 million)
- 896, Supported Living Services (\$211.7 million)

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<sup>3</sup> Historically, some day program services have been operated under Service Code 520, as when training at a day program focuses on skills used in a living arrangement (e.g., preparing a meal, making a bed).

Independent Living Program (Code 520) and Supported Living Services (Code 896) account for nearly 90% of the \$311.3 million reclassified “Residential.” In terms of day/employment services, Table 1, shows total outlays on day programs, as redefined in terms of the service codes listed, and employment services in SFY 2005-06.

Day Programs, as redefined, account for 83% of overall day/employment expenditures. Work Activity Programs (e.g., sheltered workshops) and Supported Employment, combined, account for the remaining 17%. Because some Day Programs provide employment services, in all likelihood more than 20% of day/employment outlays support “work” and earning money. Re-categorized *Transportation* outlays in SFY05-06 amounted to \$182.2 million.<sup>4</sup>

**Table 1. Total outlays on day programs and employment services, SFY 2005-06**

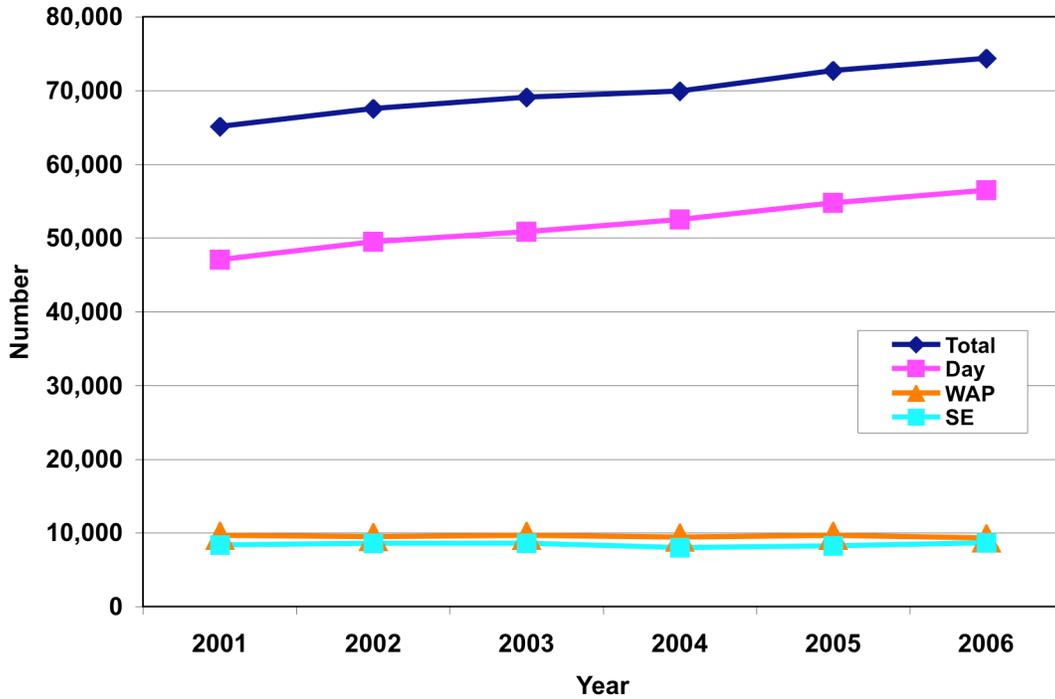
<b>Program (Service Code)</b>	<b>Amount (\$)</b>	<b>Percent</b>
<b>Day programs:</b>		
Socialization Training Program (028).....	\$20,010,931	2.7%
Community Integration Training Program (055).....	59,140,156	8.1
Community Activities Support Services (063) .....	16,523,503	2.3
In-Home/Mobile Day Program (091) .....	\$1,508,840	0.2
Creative Arts Program (094).....	1,770,154	0.2
Activity Center (505).....	42,004,583	5.8
Adult Development Center (510).....	254,107,970	34.9
Behavior Management Program (515).....	128,818,126	17.7
Social Recreation Program (525).....	3,209,385	0.4
Adaptive Skills Trainer (605).....	23,595,328	3.2
Tutor Services-Group (025) .....	1,031,078	0.1
Personal Assistance (062) .....	6,235,758	0.9
Program Support Group-Day Service (110) .....	12,565,968	1.7
Day Care-Family Member (405).....	24,634,012	3.4
Adult Day Health Center (702) .....	4,685,034	0.6
Day Treatment Center (710).....	169,950	0.0
Adult Day Care (855).....	3,917,826	0.5
Sub-total, day programs.....	\$603,928,602	82.9%
<b>Employment programs:</b>		
Supported Employment-Group (950).....	47,415,275	6.5%
Supported Employment-Individual (952) .....	14,859,092	2.0
Rehabilitation Work Activity Program (954).....	62,623,186	8.6
Sub-total, employment programs .....	\$124,897,553	17.1%
<b>TOTAL</b> .....	<b>\$728,826,155</b>	<b>100.0%</b>

Source: DDS, “Job4903 data request.xls”

**What’s the trend in use of day/employment services?** As indicated in Table 2, on the next page (and reflected in Figure 1), over the past five years there has been substantial growth in day programs, as redefined, but little change in the number of individuals using Work Activity Programs or Supported Employment services.

<sup>4</sup> This amount, incidentally, is equal to 25% of day/employment expenditures of \$728.8 million.

**Figure 1. Consumer Count in Day/Employment Services, October 2001 to October 2006**



**Table 2. Consumer Counts in Day Programs, Work Activity, and Supported Employment, October 2001 through October 2006**

Month/Year	Day/employment program			
	Total	Day Programs	Work Activity	Supported Employment
	Number			
October 2001 .....	65,114	47,072	9,683	8,359
October 2002 .....	67,534	49,456	9,500	8,578
October 2003 .....	69,103	50,847	9,669	8,587
October 2004 .....	69,953	52,507	9,451	7,995
October 2005 .....	72,700	54,775	9,683	8,242
October 2006 .....	74,394	56,457	9,275	8,662
	Percent			
October 2001 .....	100.0	72.3	14.9	12.8
October 2002 .....	100.0	73.2	14.1	12.7
October 2003 .....	100.0	73.6	14.0	12.4
October 2004 .....	100.0	75.1	13.5	11.4
October 2005 .....	100.0	75.3	13.3	11.3
October 2006 .....	100.0	75.9	12.5	11.6

Source: Tabulation provided by DDS.

**What is the [approximate] cost per user of such services?** Table 3 presents very rough estimates of the annual cost per user of Day Programs, Work Activity Programs, and Supported Employment services. Depending on how many (and which) service codes have been included under Day Programs, the average annual cost for those who used any such services appears to be between \$7,800 and \$12,000 per person-year (depending on the divisor used in the computation). It appears that the number of service codes involved in Work Activity Programs and Supported Employment is much lower. Hence, it is estimated that average annual costs per consumer-year (in 2005-06 prices) were about \$6,600 for WAPs and \$7,500 for SE.

**Table 3. Rough Estimates of annual cost per user of Day Programs, WAPs, and SE**

Program or service	Outlays, SFY 2005-06	Avg No. of consumers, Oct04,05&06	Estimated cost per consumer-year: (2)/(3)
(1)	(2)	(3)	(4)
Day Programs, one estimate* .....	\$424,930,679	54,580	\$7,786
Day Programs, another estimate* .....	603,928,602	54,580	11,065
Work Activity Programs .....	62,623,186	9,470	6,613
Supported Employment, both types .....	62,274,367	8,300	7,503
Supported Employment, group.....	47,415,275	4,491	10,557
Supported Employment, individual ...	14,859,092	3,808	3,902

\* A third estimate, based on traditional definitions used by DDS, is \$11,228 for Day Programs. This estimate included Service Codes used by DDS to define Day Programs. Included are Independent Living Programs and Infant Development Programs, which are excluded in the estimates in this table.

**Moving towards integrated employment.** Last year, substantially higher reimbursement rates for supported employment were signed into law. As a result, it is believed that consumer counts in Supported Employment have risen by at least 600. There is reason to believe that caseload growth, changes in service costs (e.g., real wages, plus benefits), and changes in the cost of living (e.g., inflation) will result in higher government outlays for nearly all service categories in the years ahead.

In SFY 2005-06, \$487.6 million was spent on four major programs: (1) Activity Centers, (2) Adult Development Centers, (3) Behavior Management Programs, and (4) Work Activity Programs. This compares with \$62.3 million for Supported Employment (SE) services, which are typically provided in integrated settings. In other words, the amount spent on the four segregated services was nearly eight times the amount spent on SE.

If there is a desire to move towards increased use of integrated employment, a short-term objective might be to avoid any further increase in the percentage of day/employment services provided under service codes collectively described as Day Programs (as in Table 2). Expressed more positively, consider establishing a near-term target (say, three to five years) of 15% of day/employment users moving to SE, given the Federal and State policy emphasis on inclusion, greater independence, and greater self-sufficiency.

**What are some implications of living arrangements for greater employment?**

People who live in Medicaid-funded long-term care facilities face enormous disincentives to work and earn. The SSDI beneficiary (often on a retired or deceased parent's account) who lives in a Medicaid-funded health care facility can keep \$35 of his/her SSDI monthly benefit, with all of the remainder designated a Share of Cost (SOC). The person with a SOC is expected to turn over that SOC to the provider to help cover the cost of care. The service provider can bill Medi-Cal only for the difference between a specified, overall rate and the SOC. If the person works and earns, every dollar of earnings will be added to the SOC. And, because the SOC is calculated on GROSS, rather than NET earnings, the person "has to pay" (or find a benefactor) for the privilege of working and earning.

People who live in licensed community care facilities (CCFs) are less seriously affected by work disincentives. For them, the Personal Allowance for personal and incidental expenses is \$119 per month. This means that the person can earn \$323 in a month before the \$119 goes away entirely, because  $((\$119 \times 2) + \$85) = \$323$ . Any earnings beyond \$323 per month impact SSI for board and care. The person will typically be expected to remedy the reduction in SSI for board and care by turning over \$1 in earnings for every \$1 lost by the provider in SSI for board and care.

**Are incentives to work increasing, decreasing, or staying about the same?**

**Work incentives and disincentives, in general**

Liberalization within SSA disability benefit programs – especially SSDI -- has been a key factor in widening of the gap in employment rates between working-age adults with disabilities and those without. See Stapleton & Burkhauser, *The Decline in Employment of People with Disabilities: A Policy Puzzle* (Kalamazoo, MI: W.E. Upjohn Institute for Employment Research, 2003). There was a narrowing in the gap in employment rates through the 1980s, but the gap has widened somewhat since then. For example, the number of successful California Department of Rehabilitation case closures peaked at over 22,000 in 1990, but has held steady or declined since that time. Currently, the number is around 15,000 per year.

**SSI recipients run into work disincentives earlier than in the past**

The \$20 per month *General Income Exclusion* and the \$65 per month *Earned Income Exclusion* have not changed with wage levels or the cost-of-living. Had the two income disregards (*General Income* and *Earned Income*) been indexed to changes in the cost of living, their value would now be about \$380 per month (\$90 and \$290). See Social Security Advisory Board, "Statement on the Supplemental Security Income Program," (2005, p. 2).

If a person were to earn \$8.50 per hour, and had no other income, he/she would reach \$85 per month working only 10 hours in the month. The *Additional Earned Income Exclusion* of \$1 for every \$2 earned would provide some economic

incentive for most people to work more than 10 hours in the month.<sup>5</sup> In 1974, the federal minimum wage was \$2.00 per hour. This meant that a person earning that amount did not reach \$85 in earnings in a month until he/she had worked 42.5 hours, rather than 10.

**Improving individual outcomes for greater self-sufficiency.** Dollars paid by governments to meet basic needs (food, clothing, shelter), including the need for other services and support (e.g., personal assistance, health care), are *transfer payments*, which means that earnings by some members of society are transferred (or redistributed) through government taxation and expenditure mechanisms from those who have earned income to those who have not. Nearly everyone believes in the importance of a *safety net*.

A person with a disability who earns more of his/her income is a very good thing. It means greater self-sufficiency. It also means somewhat lower *transfer payments*. And, if earnings come from regular jobs in the community, integration, socially valued roles, and other benefits (e.g., greater satisfaction with life) are often evident.

The recent growth in Day Programs, with little change in the number using Supported Employment, is quite likely a consequence, at least in part, of *ease of access* and the needs of many individuals for some form of supervision. The social dimension of having people to interact with (at a day program) is a possible factor as well. Low expectations, discouragement about getting a regular job, and similar factors are also doubtless at work. Finally, if a person needs some form of supervision during traditional day program hours, the implications for families and residential service providers need to be taken into account. It is not enough to study the *public* costs and benefits associated with various scenarios, because *total* costs and benefits also depend on impacts on parents, other family members, and residential service providers.

There are potential remedies, of course. For example, time limitations on use of traditional day program services, based on expected waiting time to find the right job. Additionally, it may be possible in some areas to use low-cost clubhouse models to provide supervision, until a person has been assisted in getting (and keeping) a regular job. In any event, in any *systems change* in this area, one should be alert to phenomena such as (1) any change in average age at first placement away from the

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<sup>5</sup> In the case of SSI recipients who use Section 8 rental assistance (and perhaps some other needs-based public benefits), the *marginal benefit loss rate* is typically 83 – 90%. Public Housing Authorities (PHA) expect tenants to pay 33% of their income in rent. PHAs may let a Section 8 recipient spend up to 40% of his/her income on rent for a unit renting for more than the *payment standard* established by the PHA. In such a case the tenant must pay all of the difference between 33% and the *payment standard*. At least three other factors enter in: (1) the \$1 for \$2 reduction in the SSI benefit amount is calculated on GROSS, rather than NET earnings, and income taxes and payroll taxes can amount to 20% or more of GROSS earnings; (2) some SSI recipients have significant work-related expenses (e.g., transportation, clothing, co-pays for health insurance) not attributable to impairments; and (3) if the person lives in a licensed home with an established rate maximum for services and supports, once any *Personal Allowance* gets eliminated through the \$1 for \$2, the person is expected to come up with money to replace any lost SSI going to the provider for board and care.

parents' home, and (2) the complications of supported employment (e.g., assessment, waiting for placement, etc.) compared with the easy, quick access to most Day Programs.

**What data might be collected to provide feedback on initiatives to improve employment *outcomes*?** The use of the Client Development Evaluation Report (CDER) assessment, with annual updates, would be one of several useful ways to track *outcome-based performance measures* related to employment and volunteer activity. Such data, linked to living arrangement and other variables, may be suggestive of fruitful directions in terms of policies and practices. For example, if individuals with roughly equivalent needs in *independent or supported living* are more likely to work in integrated settings, earn more than others, and use day programs or employment services less, a policy shift toward greater use of supported living would be supported.

Unsubsidized, paid employment (including self-employment) deserves attention. Measures would include, at a minimum, (1) whether employed, and (2) the components of earnings (\$ per hour, and hours per week or month). One might want to limit the time period (e.g., current month) or ask a more complicated set of questions consistently, along these lines:

1. "Did you do any work for pay (or, profit) at any time over the past year?"
2. "[If so,] in about how many weeks did you do paid work?"
3. "How much did you earn per hour?"
4. "About how many hours did you work (on average) in weeks that you did some work for pay or profit?"

It may also be helpful to gather information on (1) job tenure (how long the person has worked for current employer(s)); (2) occupation (based on tasks or functions performed); and (3) industry (based on goods and services provided by the employer).

Even if there are measurement difficulties, as there will be in asking questions that are complicated or subject to memory loss, as long as one asks the questions consistently in the same way, changes in basic direction and magnitude are likely to be valid.

**Other Considerations<sup>6</sup>.** Over the past few years, the percentage of adults with intellectual and other developmental disabilities living with parents or in their own homes have both risen, and the percentage living in licensed places has declined. It may be wise to speed up reduced use of licensed settings of nearly all kinds. It may also make sense to move away from "full package" funding of licensed residential

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<sup>6</sup> **References for this section:**

Social Security Advisory Board (2005), "Statement on the Supplemental Security Income Program." Stapleton, D.C. & Burkhauser, R.V., editors (2003). *The Decline in Employment of People with Disabilities: A Policy Puzzle* (Kalamazoo, MI: W.E. Upjohn Institute for Employment Research).

facilities, moving toward separation of (1) housing and other basics (food, public transportation) from (2) personal services and other supports, so that the existing *disincentives* for work by those living in licensed settings are minimized. The suggested practice would be closer in concept to independent or supported living services, where the person controls Social Security and other benefits, with funding agencies responsible for most paid services and supports.

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## Innovation in California

### Introduction

This section of the report outlines some examples of innovation in choice and self-direction, employment, social and recreation activities, and transportation. As exciting as the innovation, is the fact that all of these examples are from California. There are certainly dozens more as well.

### Choice and Self-Direction

#### San Diego People First's IPP Buddies

IPP Buddies are specially trained San Diego People First members. IPP Buddies can meet with self-advocates a month or two prior to their IPP meeting to get ready. The buddy will help the self-advocate organize information; identify wants, needs and dreams; and role-play to give the self-advocate greater confidence. The buddy at the request of the self-advocate attends IPP meetings in a support capacity helping to ensure that the members of the IPP team listen to the self-advocate. Buddies follow up with the self-advocate after the meeting to review and assess the actual IPP document and if need be make referrals to advocacy services if unresolved issues remain. There is no charge for the service and all conversations between the self-advocates and buddies are confidential.

#### Self-Determination Pilots Incubate Innovation in Self-Directed Employment and Community Participation

In September 1998, Senate Bill 1038 authorized the planning and implementation of Self-Determination (SD) Pilots Projects. The SD pilots were designed to enhance the ability of individuals and/or their families to control the decisions and resources required to meet all or some of the objectives in their Individual Program Plan. The SD pilots have explored methods of funding services with various cost-effective, flexible service and support options.

Information from the SD pilots provides numerous examples of individualized, innovative, and integrated employment, social and recreational services and supports. For example, in the area of employment, some individuals started their own businesses such as disc jockey, house cleaning, home repair, window washing, private transportation, bird breeding, hunting and fishing guide. Social and recreation supports have included horseback riding, snow skiing, gym and weight group memberships, and weight training.

### **Individual Development Accounts**

Kern Regional Center (KRC) recently implemented an Individual Development Account (IDA) program that allows individuals to save money without affecting their SSI benefits. The individual develops a plan with a savings goal and places earned income into the account. After achieving the savings goal (maximum of \$2,000) the individual also gets the accrued interest on savings plus a match for each dollar saved from a community partner bank. In the KRC program, it's a three-dollar match for every dollar saved. That would mean over \$6,000 for those who save the maximum. Monies must be used to buy a house, go to school or start a business. As far as KRC knows, this is the first IDA plan specifically focusing on people with developmental disabilities to be approved by the Social Security Administration.

### **Integrated Employment**

#### **Encouraging Self-Employment in the Far Northern Regional Center Area**

Throughout the State, there are many examples of individuals who have successfully started and maintained their own businesses. For those who have failed, the difference is typically about a lack of training in basic business practices (e.g., developing a business plan, marketing, pricing goods and services), support of family, friends, an agency, or adequate start-up.

At present, a model for a Self-Employment Center currently operates in the Far Northern Regional Center (FNRC) area. FNRC has vendored a self-employment support service as a part of the *Adventures in Business Project*. The Project includes a Business Consultant and a Development Committee who help interested individuals complete feasibility studies for new business ideas. In addition to business feasibility, a review of current individual benefits is also completed. If the business idea is a viable one, a business plan is written and customized support is provided to help the individual start-up and maintain the business.

#### **Coby's Gift Shop**

Coby Short is long on ambition and he knows who's the boss. Coby is an entrepreneur who has opened his own gift shop in the Bakersfield Heart Hospital. He also happens to have a developmental disability and uses services and supports from Kern Regional Center. The store sells candy bars, glass baubles, purses and silk flower arrangements to hospital staff and the families of patients. Coby rides a bus to work in the morning and opens up shop himself. He has a business coach, thanks to Goodwill Industries, who helps him keep business on track.

He learned to use a cash register and help customers at the All Star Café (launched by the Kern Regional Center to help individuals with developmentally disabilities start careers). The hospital didn't have a gift shop before Coby came along. Now doctors are prone to dart out into the lobby to grab a quick snack in the middle of their rush. Kern Regional Center bought the kiosk for Coby, and he's paying off the loan with

profits from the business. Mr. Short's business coach said the business is already doing well -- better than what they expected. And Joyce Short, the stock buyer for Coby's Gift Shop, said the personal payoff for her son is huge.

### **Micro-Enterprise Development Project in Southern California**

The project will support at least 25 individuals with developmental disabilities to start their own small businesses (micro enterprises) and create a cadre of six provider organizations who will develop the capacity to assist these individuals and others in the future to start and maintain their own small businesses. The six provider agencies are: Jay Nolan Community Services, Arc Ventura County, Alpha Resource Center, People Creating Success, Inc., Work Training Program and Easter Seals.

Service providers received a training and technical assistance grant from the State Council. Training was provided in the fall of 2006 on small business development and social security considerations for small business development. The cadre of providers developed a model service design, vendor code and rate structure for micro-enterprise development services. While each agency is employing similar techniques to assist individuals to start businesses, each is organizing and being reimbursed for services by different methods. The participants have been selected, and are starting to work on their business plans. Businesses are scheduled to launch at the end of the project at the latest, in the fall of 2007.

### **Communications @ Ease**

Created by people with developmental and physical disabilities, Communications @ Ease (C@E) was started with the idea that people with difficulty speaking need comfortable and effective ways to communicate with others. C@E is in the business of designing communication boards that help speech-challenged children, young adults, adults and elders interact with their world. It's based on the business model that when people with disabilities learn valuable skills and have a good idea, they can create a company.

The four employees of the company currently own it. They also contract with other individuals with disabilities as needed. Custom communication boards in English, Spanish and Cantonese are sold through a catalogue, e-bay Amazon, and Cafepress.com. They have successfully completed a number of contracts and are currently working on a project with AC Transit (the public transportation provider for Alameda and Contra Costa counties).

C@E also received a micro enterprise grant from UPS to purchase a color printer for brochures and communication boards. Several of the employees have developed Plan to Achieve Self Sufficiency (PASS) with the Department of Rehabilitation to help with start-up expenses for C@E and other businesses. C@E hopes to become self-sustaining over the next few years.

At present, the business is operated out of the Cerebral Palsy Center for the Bay Area in Oakland. The CP Center provided C@E a start-up loan, space, and support staff through its day program. It's become a business incubator for several other self-employment ventures as well.

### **Puppetry Is A Passion and An Income**

Dusty Dutton always wanted to be an entertainer. She was doing hotel housekeeping work, but only three hours per week. As a hobby, she was doing puppet shows for birthday parties and for the kids at the local Head Start as part of her day program. In 2006, she started her own puppetry business called Dusty's Puppets. The business was started with help from an extended circle of support that includes her parents, a supported living and day services provider (Casa Allegra Community Services), a benefits counselor at the Marin Center for Independent Living (MCIL), and some fascinated business professors at the College of Marin.

After a feasibility study (which included an analysis of benefits and supports) and a business plan were completed, Dusty's Puppets came into existence. Initial startup funding was provided by Dusty via a PASS Plan, secured through the Social Security Administration. In the first year, Dusty's Puppets has developed three streams of income: (1) puppet shows, for parties and special events, for groups of young children through contracts with day care centers and preschools, and for the public at farmer's markets and fairs; (2) retail sale of puppets from two major toy companies, at farmers' markets, holiday fairs and on line ([www.dustyspuppets.com](http://www.dustyspuppets.com)); and (3) public speaking about micro-enterprises and the Dusty's Puppets story. In her first year, Dusty has easily met the income goals of her business plan. More important to her, she has gained pride and self esteem as a professional puppeteer, plus wide acceptance and appreciation in her local community as a valued contributor.

There have been a few challenges. First, Dusty did not know how to run a business. A business class at the College of Marin was a big help in developing an understanding of the process of business development. Next, she needed startup funding. This was secured with the help of the MCIL benefits counselor and the development of a PASS Plan approved by Social Security. Also, potential effects on her SSI, SSDI, IHSS, Section 8, and MediCal were studied with help from the benefits counselor. While needed supports have been in place for Dusty through Casa Allegra (with funding from Golden Gate Regional Center), vendorization to help others start their own businesses continues to be under development.

### **White Out**

Kyle White has his own business up on the North Coast. Kyle is the sole employee of *WHITE Out!*, a mobile paper shredding business started in 2001. After a lot of preliminary discussion and encouragement from Kyle's parents, the Department of Rehabilitation (DOR) agreed to pay for a feasibility study and business plan. Once those planning documents were completed and indicated a positive business

outcome, DOR also agreed to fund start up costs and full job coaching.

WHITE Out is designed to take care of confidential paper shredding. More and more individuals, businesses and professional offices are finding it necessary to shred material that must be kept private or to prevent identity theft. Rather than purchase a shredder and pay an employee to shred, Kyle travels to an office (using public transportation) with his state-of-the-art portable shredder. As an added environmental benefit, the shredded material is re-used by both a local nursery and a packaging business.

DOR continued to pay for job coaching for one and a half years before transferring the funding to Habilitation. His job coaching started at 100% in the beginning and quickly dropped. He has someone help him about 1.5 hours per week working on scheduling, contacts, buying supplies, etc. The business pays for equipment, supplies, Chamber dues, bus license, taxes etc. With his parents' help, he submits a profit and loss statement annually to his payee who submits it to SSA and they do an annual calculation on his benefits. There have been bumps along the way, mostly with the equipment, but after much trial and error Kyle has found the "perfect" shredder!!

### **All Star Café**

Kern Regional Center sponsored the establishment of the All Star Café which employees several individuals with the aim of helping them spin out into a variety of jobs or their own businesses. The Café is managed by Tracey Mensch, who also happens to use regional center services. Three former employees have moved on to stable jobs elsewhere in the community. One former employee now has his gift shop business up and running.

## **Integrated Social and Recreation Activities**

### **Peer Mentors**

The Peer Mentor Lifestyle Coach Agency (PMLCA) is a non-profit organization (Westside Regional Center area) that specializes in training individuals with developmental disabilities to serve as peer mentors. The unique feature of PMLCA is that peer mentors are responsible for training and assisting their peers who, like themselves, live with developmental disabilities. The peer mentors are paid employees whose role will be to provide independent living support, and to become community inclusion partners, enhance socialization and facilitate healthy lifestyle changes for their peers.

Mentors will complete a 20-week training program prior to working with an assigned peer. The training curriculum consist of training in mentoring, leadership and role modeling, active listening and communication, motivation and encouragement, public speaking, socialization, support skills, community systems navigation, independent living skills and healthy lifestyle (nutrition, fitness, access health care, etc.)

### **Finding a Balance Between Inclusive Recreation and Adapted Services in Davis**

Publicly funded recreation services have attempted to meet the divergent needs of individuals with disabilities in various ways. Many local community recreation services provide adapted services. Others attempt to provide inclusive recreation when requested unless a reasonable accommodation is not possible. Achieving a balance between these approaches and remaining flexible enough to change with the needs of the local customer base is difficult. Since 1992, the City of Davis has been actively and successfully striving for this balance. Davis offers a full range of recreation experiences for people with disabilities ranging in age from infants to seniors.

*Alternative Recreation* and *Teen Group* activities are focused on local outings and day trips (e.g., dinner, movies, bowling, San Francisco). In the *Adapted Recreation* activity program, additional assistance is built into activities and supplemented as needed. Support services for individuals who participate in *Inclusive Recreation*, are most often provided by a recreation coach. Some participants who continue to enroll in the same activity, over time, have transitioned to natural supports (by instructor or other participants). At this time, individuals with significant behavior challenges or self-help needs and adults living at home with older families are often unserved or underserved. In addition, people with physical disabilities are often limited to recreation activities within Davis because the Department does not have enough accessible vans.

At present, the approximate budget for *Alternative Recreation* and *Alternative Teens* is about \$150,000 per year. The costs for *Inclusive Recreation* are about \$12,000 per year. In the past five years or so, the majority of funding has been covered through a *Community Development Block Grant*. Additional funding is provided through the City's general fund. For the Parks and Community Services department of Davis, the future of services to people with disabilities is primarily about: (1) educating the public on the availability of services; (2) learning more about individual interests; and (3) continuing to listen to customers when developing or expanding services.

### **Arc's Inclusive Senior Services**

In 2006, the Arc of Southeast Los Angeles County developed a new service option for active seniors who want to retire from day, workshop or employment services. This new inclusive service is open to seniors 50 years or older who want to participate in existing senior options in local communities. The Arc provides one Senior Facilitator for every three individuals with like interests. Ninety percent of all activities are with senior centers in Norwalk, Lakewood and Long Beach.

This is a retirement program and attendance is not required, but is higher than many other programs. A monthly calendar outlines activities, locations and costs associated with events. The Arc also welcomes seniors without disabilities who want to enjoy this service.

### **Redwood City Parks and Recreation Foster Recreation Inclusion**

In 2005, the Redwood City Community Services Department received a grant from the California State Council on Developmental Disabilities to launch a Community Inclusion Initiative Plan. The plan will support their belief that quality recreation and community services should be made available to individuals with all disabilities by providing accessible, integrated, safe and welcoming recreation environments. To accomplish this, a partnership consortium was formed to open a line of communication between agencies specializing in accessibility services and/or those who have an interest in providing inclusive services in San Mateo County.

From this consortium, a countywide Recreation Service Guide is being created to offer individuals and families a one-stop shop reference to recreation services specifically for people with disabilities. Another component of the initiative includes providing training for recreation leaders and professionals to assist with inclusion practices. Last, Redwood City has launched a mentorship program that calls upon local community members to volunteer their time to provide one on one support for participants with special needs in mainstream recreation programs. This is a great opportunity for high school and college students looking for community services hours and/or experience in the therapeutic recreation field! It is also an incredible opportunity for busy professionals who can only commit to short amounts of time to volunteer.

### **Alternative to Day Services Task Force**

In the Tri Counties Regional Center (TCRC) area, the Alternatives to Day Services Task Force has set out to significantly expand the traditional array of day service options for adults and transition aged youth over the next three years. The Task Force consists of TCRC staff, parent TCRC board members, Area Board IX representatives, providers and persons served. One of their first efforts is the *Agent, Adaptor and Associate* pilot. The purpose of the model is to serve as a fully integrated, community-based alternative to a traditional day program using individualized supports. The team of the agent (leader), adaptor (educator), and associate (support facilitator) support the individual in taking full advantage of current resources available in the community or, as needed, develop new resources. The intent is to provide up to 6 hours of individualized supports in the community for the individual based on the person-centered plan.

### **Golden Gate Regional Center's (GGRC) RFP for Integrated Community Services**

The Department of Developmental Services has authorized all twenty-one regional centers to provide start-up funding for projects that increase the opportunities for consumers to more fully participate in their communities as employees, volunteers, or participants in integrated social, recreational, or civic activities. These start-up funds are a result of the 2006-2007 Budget Act. GGRC views these funds as a complement to their current effort to reshape day services with a focus on employment and integrated community participation.

GGRC is seeking creative ideas for projects that will increase integration for individuals in work and other community settings. Start-up funds may be used to fund projects or programs that: (1) create or increase supported work options on an individual basis or in groups of three or less consumers and/or (2) create or increase integration into social, civic, volunteer, or recreational settings. Proposals may be for a full time program; a project that reduces barriers or increases opportunities for integration; or, an adjunct to other services received by consumers that would increase integration. Proposals which support services that are in fully-integrated settings or generic services will receive additional credit. Proposals must indicate outcomes that will be achieved by the implementation of the project.

### **Theatre Arts in Bakersfield**

Kern Regional Center has developed a working relationship with The Spotlight Theatre, a theater group in Bakersfield. They offer classes that develop skill sets in several areas of theatrical production. For example, acting, set construction, and the technical aspects of theater. Upon completion of the classes, participants can choose to be involved in theatrical productions (which will also include individuals without disabilities). The goal is that participation in regular Spotlight productions as well as productions of other theatrical groups in town. In fact, auditions were recently held for an upcoming Spotlight production and several individuals with developmental disabilities were included.

### **Transportation**

#### **San Diego County's North County Transit District (NCTD)**

The NCTD has developed several initiatives that will support the efficient and effective use of public transportation by people with developmental disabilities. FACT or Full Access & Coordinated Transportation was launched and incorporated as a non-profit in 2006. The group is working toward its vision, which is "that all people living in San Diego County will have full mobility within their community by an accessible transportation system that meets their individual needs." FACT envisions this happening by sharing resources from existing transportation providers, public and private, which would be coordinated through a centralized dispatching system. FACT is working to begin a pilot project in North County.

In addition, the NCTD funds a mobility and travel training program. NCTD launched the travel and mobility training program to allow passengers, including people with disabilities, a chance to learn how to ride public transportation from an expert. In 2006, more than 240 participants took the travel-training course and 180 went on a customized day-trip to learn first hand how to navigate the bus and train system.

## **Postsecondary Education**

### **Taft College**

The Transition to Independent Living Program (TIL) at Taft College (TC) is a post-secondary experience for developmentally disabled adults emphasizing learning independent living skills. The program stresses the importance of teaching people to accept responsibility for decisions and choices they make. The program currently has a waiting list of about 300 for their two-year program that is only able to accept about 25 students per year.

The program occupies 28 rooms in the Seventh Street residence hall, one of two residence halls on the Taft Community College campus and a 4-bedroom house in the community. TIL began in August 1995, with funding from Kern Regional Center. The college serves as the sponsoring agency. TC has had programs and special classes serving individuals with developmental disabilities since 1976.

Students participate in the program an average of 22 months. Staff works with each student to establish realistic long-range and short-range goals. Individual Program Plans (IPP's) are then written to assist students in attaining these goals. Instruction is offered in the following areas: meal preparation, money management, shopping, housekeeping, use of appliances, safety, communication, transportation, personal care, and interpersonal relationships.

### **Pathways at UCLA**

Pathways is a two-year certificate program developed through the UCLA Extension Program. It started in September 2007, and focuses on academics, developing independent living skills and vocational exposure. Students have a structured class schedule during the first year, but are able to pick their own classes for the second year. While Pathways students do not take classes with UCLA students, they are encouraged to take classes with other students in the Extension Program and through the recreation center.

Pathways emphasize the importance of developing social skills. For example, teachers create hypothetical situations and ask students to take notes and think about the way they would react to certain situations. Students are strongly encouraged to live in Westwood apartments with fellow classmates to further reinforce the skills they are taught in class.

## **Transition**

### **Point of Transition**

About 350 students in San Diego County have benefited from participating in the Point of Transition System Integration Project (POTSIP) since 1997. The Project, funded initially by a three-year grant from the Department of Education, was designed to improve the level of interaction and collaboration among the three major service

delivery systems involved in helping students with severe disabilities as they transition from school to adult life. These systems include public schools, the Department of Vocational Rehabilitation (DR), the Department of Developmental Disabilities Center - Regional Centers (DDS), and the adult service providers.

Point of Transition has introduced a “new way of doing business.” The “old way of doing business” was to rotate students through various school based work-sites during the four years of transition class and then refer to DR for supported employment a couple of months before graduation. By the time applications and referrals to an appropriate supported employment (SE) agency were done, students were out of school and sitting home waiting for a placement. Job development can often take 6-8 months and momentum and motivation are often lost. This new common sense approach says, “just start earlier.” The new way is for an SE agency to work with the student the last 9 months of school, develop a permanent job, and let the school staff help build a schedule of non-work activities around that real job and introduces adult services while still in the safety net of the school system.

One of the major events that ensured that the Point of Transition Model would continue after their grant funding period ended is that DR in San Diego County committed the use of supported employment dollars for any eligible students in transition classes during the last year of school. Transition teachers can have assistance with job development, job placement, and job coaching by any vendorized adult service agency willing to work with public schools, DR and DDS cooperatively to provide individualized supported employment services for students.

San Diego City Schools TRACE Program has been nicknamed “the Cadillac of the Model” by POTSIP facilitators. Their program serves all students and actually subcontracts with six different adult agencies to begin adult programming for even those students not targeted for supported employment. TRACE and Point of Transition staff work closely with the San Diego Regional Center service coordinators to be sure funding for these community based programs will continue upon exit from public schools. A seamless transition occurs, the first day in an adult system funded program looks no different than the last day of school.

### **Bridges to Youth Self-Sufficiency**

Benefits can provide individuals with developmental disabilities the support they need to become more self-sufficient. They also serve as a safety net of core services (e.g., housing, health and safety). However, there is a serious gap in the capacity of local agencies (e.g., service providers, regional center) to provide information to individuals and their families about income, health, housing, educational and other benefits. This results in a significant lack of knowledge by individuals and families about the availability of benefits and often creates a barrier to greater self-sufficiency (e.g., fear of losing benefits due to work). It can also result in difficulties that can be avoided (e.g., overpayments).

Benefits planning can help resolve these problems, but it is not typically available to individuals and their families in California. However, there is a model program to provide this service within the State. Funded by the Social Security Administration, *Bridges to Youth Self-Sufficiency* (located in seven California school districts) is dedicated to informing and motivating young people with disabilities and their families about work, the effects on benefits and the availability of current work incentives. The goal is to assist youth with the transition to work and adult life, and to help them maximize their economic independence and achieve greater self-sufficiency. One of the cornerstones of the project is benefits analysis and planning. Staff at the seven sites include a benefits planner and a service coordinator.

### **Partners in Community Inclusion**

For the past three years, The SCILS Group has collaborated with Eastern Los Angeles Regional Center (ELARC) to provide Partners in Community Inclusion (PiCi). The Partners program is an ongoing facilitated parent group model for families who have young children and transition age youth with developmental disabilities. PiCi believes in the value of developing school and community inclusion, friendships and a self-determined future for their children. Becoming an independent adult and a valued member of the community begins long before a student leaves high school. Parents play a vital role in preparing children for a successful transition to adult life by helping their child gain an awareness of themselves; understanding their own strengths, gifts, interests and areas of challenge. Beginning this exploration at an early age sets a high bar for children with disabilities and communicates an expectation and permission to dream about a future of boundless possibilities, no different than that of children without disabilities.

The Partners in Community Inclusion parent group meets monthly and participants are dedicated to creating enhanced opportunities of community access and inclusion for their preschool, school age and adolescent children. Facilitators use strategic coaching, graphic materials and interactive work sessions aimed at demonstrating the core values, thinking process and planning needed to ensure access to neighborhood and community supports, strong partnerships with agencies, typical associations as well as community service and job opportunities. Most important, all parents are guided to develop their own unique inclusion vision for their child determined by their family values, interests of their child and use their family vision as a guide and beacon to pursue a self directed and inclusive life for their child.

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## Initiatives, Policies and Practices from Other States

### **Florida 5-Year Employment Initiative<sup>7</sup>**

On July 1, 2004, the Florida Agency for Persons with Disabilities (APD) implemented a 5-Year Employment Initiative for people with developmental disabilities. The goal of the initiative is that at least 50 percent of adults (18-55) receiving APD-funded day services, such as adult day training (ADT), supported employment or non-residential supports and services (NRSS) as of July 1, 2004, will achieve community employment by July 1, 2009.

The initiative is part of a larger strategy to greatly expand community-based employment options and the development of self-employment opportunities. The initiative began with the expectations that each state district would redirect a minimum of five percent of the people from Adult Day Training services to employment in the competitive work force each year over the course of the next five years. Districts have developed specific performance targets and resource strategies for the achievement of this objective.

Stakeholders have clearly stated the need and expectation for people with developmental disabilities to receive the supports and services necessary to achieve and maintain employment in the competitive workforce. A study conducted by the Florida Developmental Disabilities Council in 2003 surveyed self-advocates with developmental disabilities and found that a full 75 percent of people who were not employed wanted a job working in their community. In announcing the initiative, the interim director for Florida's Agency for Persons with Disabilities, noted "employment opportunities shall be pursued ignoring conventional expectations for prevocational training or similar programs...in favor of learning through on-the-job training and experience specific to the workplace."

### **Virginia State Employment Initiative<sup>8</sup>**

On February 5<sup>th</sup> 2007, Virginia Governor Timothy M. Kaine announced that a two-year \$244,000 grant was awarded to Virginia Commonwealth University's Rehabilitation Research and Training Center (VCU-RRTC) to promote public-private partnerships that will result in the employment of at least 20 Virginians with disabilities by state government. The grant stipulates that at least half of these individuals be those with developmental disabilities.

The initiative, approved by the Virginia Board for People with Disabilities (VBPD), also

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<sup>7</sup> National Association of State Directors of Developmental Disabilities Services. *Community Services Reporter*. July 2004, Vol. 11, No.7.

<sup>8</sup> Excerpted Press Release from the Office of the Governor Timothy M. Kaine, Commonwealth of Virginia 2007.

includes training for rehabilitation professionals to develop more effective partnerships with private-sector staffing organizations that will increase employment opportunities for people with disabilities.

The Board authorized a \$244,000 grant comprised of federal funding from the U.S. Health and Human Services Department, and VCU-RRTC will provide an additional \$82,000 in matching cash and in-kind support. The project will include training for approximately 400 rehabilitation professionals in community-based programs, employment agencies, and staffing companies in the greater Richmond area to identify appropriate job opportunities, develop referral procedures, recruit applicants with disabilities, and place those applicants in temporary jobs with potential to become permanent. Training in working with qualified on-site employment coaches, disability awareness, communications issues, and other job accommodations will also be provided.

“Improved employment opportunities for our citizens with disabilities can have a profound impact not only for these individuals and their families and caregivers, but also for those who work alongside them,” Governor Kaine said. “We should encourage additional state hiring of employees with disabilities not just because it is the right thing to do, but also because state government can serve as a role model for other public and private employers.”

### **A Blueprint for Retooling Employment Options in Illinois<sup>9</sup>**

The State Council on Developmental Disabilities has developed a Call for Investment or request for written proposals to reach the following performance target:

*By December 31, 2007, The Council will have a Blueprint for Illinois of strategies and approaches to overcoming barriers to shifting from segregated sheltered workshops and developmental training programs to individually supported employment models in integrated environments for people with developmental disabilities.”*

The proposal states that the project is about developing a Blueprint for organizational change and increasing opportunities for people with developmental disabilities to achieve their desires in the area of employment. The Council is interested in receiving proposals to develop processes for systems change that can be utilized statewide. The Council wants a plan for Illinois that explores incentives to shifting to an integrated approach and the disincentives that exist against making such a shift.

In Illinois, attention has focused on developing integrated housing options for people with developmental disabilities. Integrated, inclusive employment options for people with developmental disabilities, especially those with significant disabilities, has not received the same focus nor has there been the demand for alternatives to the traditional segregated employment models. Often, choice is limited to sheltered

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<sup>9</sup> Excerpt from the Illinois State Council website.

employment or developmental/day training programs, maintaining a system and culture of segregation within local communities with little exposure to more person-centered alternatives.

### **Top States in Integrated Employment<sup>10</sup>**

In 2003, the Institute on Community Integration reported on a study of thirteen states considered to be high performers in integrated employment. Most were small states (e.g., Maine, Vermont), but there were some large states as well (e.g., Florida, Ohio, Michigan, Minnesota). The report in 2003 outlined the common characteristics of the thirteen. The seven themes that emerged were:

1. Clearly defined goals and data collection;
2. Strong agency leadership;
3. Interagency collaboration;
4. Ongoing training and outreach;
5. Communication through relationships;
6. Local control; and
7. Flexibility and respect for innovation.

### **Washington's Working Age Adult Policy<sup>11</sup>**

In July 2004, the State of Washington implemented a policy to provide working age adults with developmental disabilities the supports needed to achieve gainful employment. The policy states:

*Gainful employment results in individuals with developmental disabilities earning typical wages and becoming less dependent on service systems. In addition, employment provides the rest of the community with the opportunity to experience the capabilities and contributions made by individuals with developmental disabilities.*

It establishes employment supports as the primary use of employment/day program funds for working age (21 to 62) adults. Employment is defined as that which reflects achievement of or progress towards a living wage in a typical community setting. If individuals of working age do not want to pursue or maintain gainful employment, then the authorization of county services will be discontinued and information about generic community services will be provided.

The policy was developed through a lengthy stakeholder process and the implementation of the policy took several years. In Washington, the Stakeholder Workgroup recommended persons of working age should be gainfully employed, participating and contributing to community life, using a variety of strategies to reach

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<sup>10</sup> Allison Cohen, John Butterworth, Dana Gilmore, and Deborah Metzel. *High-Performing States in Integrated Employment*. Institute for Community Inclusion - Research to Practice. Volume 9, Number 1, February 2003.

<sup>11</sup> Excerpted from materials provided by the State of Washington's Division of Developmental Disabilities.

this status in the community. Specifically, the report states: "Pathways to Employment: Each individual will be supported to pursue his or her own unique path to work, a career, or his or her contribution to/participation in community life. All individuals, regardless of the challenge of their disability, will be afforded an opportunity to pursue competitive employment."<sup>12</sup> Counties (similar in their funding responsibilities to Regional Centers) were given two years to implement the policy.

Guidelines for implementation are as follows: (1) Counties determine with individuals and family members if individuals want to pursue or maintain gainful employment in an integrated setting in the community; (2) All individuals between the ages of 21 and 62 shall be gainfully employed or have an employment plan, which reflects the goals needed to pursue or maintain gainful employment; (3) Each individual shall receive supports needed to implement the plan; (4) If individuals of working age do not want to pursue or maintain gainful employment, then the authorization of County services for day programs will be discontinued and Case Resource Managers will provide information about generic community services; (5) Counties may continue to authorize services that do not emphasize employment only for individuals who have been granted an exception to policy.

### **Employing Individuals with Disabilities in Nine State Governments<sup>13</sup>**

This report issued by the U.S. Equal Employment Opportunity Commission in 2005, highlights best practices of nine states that promote the hiring, retention, and advancement of individuals with disabilities in state government jobs. The EEOC points out that with more than five million workers nation-wide and with the unique opportunities they have to serve as model employers, state governments can play a significant role in enhancing employment opportunities for people with disabilities.

As an example of recruiting and hiring best practices, Vermont and Washington work with organizations of and for individuals with disabilities as part of their targeted outreach and recruitment efforts. Maryland has a Coordinator of Special Outreach and Employment Programs to assist state agencies in targeting diverse applicant pools for state positions that include persons with disabilities.

With regard to reasonable accommodation, several states provide procedural safeguards to ensure that reasonable accommodations are not inappropriately denied. Utah trains all of its ADA Coordinators to submit any proposed denials to the Division of Risk Management so that they can be reviewed for legal sufficiency; Vermont created a Reasonable Accommodation Committee to which an employee may have a denial submitted for review; and Washington requires that all denials of accommodation be signed by the head of the employing agency.

Other examples of best practices include Maryland and Vermont. They have

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<sup>12</sup> Division of Developmental Disabilities, Olympia, Washington (7/04). *County Services For Working Age Adults Policy 4.11*.

<sup>13</sup> Excerpted from the *Final Report on Best Practices Employing Individuals with Disabilities in Nine State Governments* issued by the EEOC in 2005.

participated in a pilot project to have some employees serve as “disability program navigators” at state One Stop Career Centers created under the Workforce Investment Act to help people with disabilities access these services more easily.

The report concludes with a summary of several positive trends. For example, applicants for state employment are frequently given information about the availability of reasonable accommodations for the application process, and job announcements and position descriptions do not appear to be drafted in ways that would discourage people with disabilities from applying for state jobs. Also, some states have undertaken targeted outreach to and recruitment of individuals with disabilities.

Supervisors, managers, and other state personnel responsible for the hiring, retention, and advancement of people with disabilities have access to sufficient information about their ADA obligations. The use of written procedures for providing reasonable accommodations, methods of documenting and tracking the disposition of requests, and the provision of appeal processes following denials of reasonable accommodations are also positive trends in some states.

The study was unable to determine the extent to which individuals with disabilities have been able to advance within state government once hired. There was also little evidence that the states undertake any measures to determine the distribution of employees with disabilities among the various levels of the state government workforce.

Finally, many of the best practices identified in the report resulted from legislative or executive actions. This sends a clear message “from the top” that the employment of people with disabilities is a priority for the states.

### **Study on What Workers Prefer<sup>14</sup>**

In a recent article published in the Journal of Vocational Rehabilitation, authors Migliore, Mank, Grossi and Rogan note that despite national and state policies promoting integrated employment, seventy-six percent of adults with intellectual or developmental disabilities are served in facility-based programs. Their article focuses on whether or not this gap between policy and practice is in part due to the lack of interest of adults with intellectual disabilities and their families for employment outside facility-based programs. The authors surveyed 210 adults with intellectual disabilities in 19 sheltered workshops, their respective families or caregivers, and staff members in these workshops. Results show that seventy-four percent of adults with intellectual disabilities, sixty-seven percent of families, and sixty-six percent of staff felt those they serve would prefer employment outside workshops, or at least consider it as an

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<sup>14</sup> Migliore, A., Mank, D., Grossi, T., and Rogan, P. (2007). Integrated employment or sheltered workshops: Preferences of adults with intellectual disabilities, their families, and staff. Journal of Vocational Rehabilitation Vol. 26, No. 1, pp. 5-19.

option. The majority believed that adults with intellectual disabilities can perform outside workshops if support is made available. The study highlighted the fact that the preference for employment outside of workshops is not associated with the severity of the disability.

### **Vermont Closes Sheltered Workshops<sup>15</sup>**

Vermont closed its last sheltered workshop for individuals with developmental disabilities in 2003. This effort involved effective interagency, university, provider, and stakeholder collaboration. Also key were state regulations that gradually restricted and then prohibited the use of state funds for sheltered workshops and enclaves. With the conversion of sheltered workshops into individualized supports, services were tailored for individuals and most received one-on-one day supports for employment and/or other day activities such as volunteer work, recreation, keeping appointments, running errands, and visiting family and friends. Vermont used three main strategies to complete this conversion:

1. Keep a clear goal in mind of providing individualized day supports to everyone receiving services.
2. Approach the work in stages by first ending new placements and then converting workshops to community-based options.
3. Maintain open communication by involving stakeholders in order to address concerns as they arise.

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<sup>15</sup> Excerpted from information provided by the Institute for Community Inclusion.

## Goals, Recommendations, and Strategies<sup>16</sup>

### Introduction

Some forty years ago, individuals with developmental disabilities in California were often isolated from their fellow citizens. Families and other advocates asked the State to write policies and direct resources to help end that isolation. The State, the Regional Center system, and Service Providers responded and community group homes, day programs and workshops were created. This system of programs has served people well.

Over the past forty years, there has been a steady growth in different ways that people can choose to live. In addition to community group homes, there are now opportunities for individuals to continue to live with their own family, other families, or to live on their own with support. Expansion for choices in what people do during the day has not kept pace.

It's 2007, and a new day! Individuals with developmental disabilities, their families and advocates are once again asking the State, Regional Centers and Service Providers to take a big step. To join them in writing policies and redirecting resources that will provide new opportunities for working and participating in the community alongside their fellow citizens. To make sure that by the year 2012:

- (1) individuals and families get the information they need to make informed decisions about integrated employment, community participation, work and health benefits at their IPP meetings;
- (2) individuals who choose to, have their own self-directed service budgets, decide on the kinds of services they want, and buy their services;
- (3) collaborative transition teams are available to help individuals and their families plan for what happens after school such as employment, college, community living and participation;
- (4) there are incentives for employers, providers, and communities to support people with developmental disabilities to expand their opportunities for integrated employment and community participation;
- (5) there are standards for good quality integrated services; and
- (6) there is a statewide way to measure progress in what people earn from employment and how they spend their time in the community.

The following recommendations will help move the system of services and supports for individuals with developmental disabilities and their families towards accomplishing

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<sup>16</sup> Each goal is presented in **bold** with a one or two sentence narrative. Recommendations are also presented in **bold and are in easy-to understand language** followed by a more complete description of the intent.

those goals by 2012. While the timelines for the goals, recommendations, and strategies listed below are energetic, we expect that it will take five or more years to fully implement them. If averaged over five years, the resources needed for implementation would be approximately five million per year. The return on that investment will be a significant increase in the number of Californians with developmental disabilities who are productive, tax paying, more self-sufficient, and more involved in their communities.

### **Goals, Recommendations, and Strategies**

Based on the themes developed by the Stakeholder Workgroup (listed in Core Values section of this report), eighteen recommendations were initially drafted for review. Feedback from the workgroup in subsequent meetings resulted in a set of revised, draft recommendations and strategies grouped by four major goals listed below that are inclusive of the SB 1270 legislative directive. The final set of recommendations and strategies below are based on feedback from stakeholders throughout the State.

#### **Goal 1. July 1<sup>st</sup> 2008, opportunities for integrated employment and community participation are discussed at all Individual Program Plan meetings.**

**Recommendation #1: Make sure people with developmental disabilities and families get information about integrated employment, community participation, work and health benefits at their IPP meeting.**

*Strategy #1.1 Options for integrated employment, community participation, and benefits planning are included in the Individual Program Planning (IPP) process by July 1<sup>st</sup>, 2008. Description:* Adjustments are made to Regional Center IPP training materials, procedural guidelines and assessments for transition-aged youth and adults to include resource information about options for integrated employment and community participation that reflect the individual's lifestyle, culture, language and spiritual preference, as well as income, health, and educational benefits (in the primary language of the individual). Planning should start with the assumption that all individuals, if they choose, can be involved in income-producing activities and be active members of their community. As agreed upon by the individual's planning team, goals and objectives regarding employment, community participation, and benefits planning are developed and, if needed, regional center resources are allocated.

*Strategy #1.2 Consistent with the Workforce Inclusion Act (AB 925) and the efforts of the Governor's Committee, the Council recommends adding a benefits planner position to the Regional Center core staffing formula by July 1<sup>st</sup>, 2008.*

**Description:** This regional center or contract, trained expert position (one per 4,000 persons served) would:(1) provide benefits (including Social Security, Medi-Cal or other benefit programs) and financial planning assistance to individuals served by the regional center; (2) support the development of an individual benefits analysis by service coordinators or service providers; (3) communicate with local

Social Security representatives to determine benefit type, levels, previous use of work incentives; (4) assist individuals, family members, or service providers in reporting wages and other information to Social Security; (5) with and on behalf of individuals, advocate with Social Security to clarify issues and ensure equal application of work incentives and other rules; and, (6) provide in-service trainings on Social Security work incentives, Medi-Cal or other benefit programs to individuals with developmental disabilities, family members, regional center staff, service providers, and other support service personnel. All services, supports and materials will be provided in local threshold languages.

*Strategy #1.3 Advocate for change in Community Care Licensing (CCL) regulations, policy and practice to enhance flexibility in services to allow persons with developmental disabilities access to integrated community employment options. Description:* Greater flexibility would allow individuals to work alternative schedules in the community such as swing shifts, night shifts and split shifts. In addition, regional centers in their orientation and training for new care providers, could incorporate discussion regarding integrated work, flexible living and working schedules. The Council and other stakeholders will advocate for a change in CCL regulations that currently mandate staffing ratios that prevent alternative work schedules.

**Recommendation #2: People have their own self-directed service budgets, decide on the kinds of services they want, and buy their services.**

*Strategy #2 Complete the Self-Directed Services Waiver and implement the self-directed services program in California by July 1<sup>st</sup>, 2008. Description:* It's important that DDS completes the application process and implements the program as soon as possible. The self-directed waiver is a step forward in helping California citizens with developmental disabilities plan and achieve their personal goals. Self-directed services include non-residential services like employment, educational, social and recreational supports. The Department should continue to work with self-advocates and representatives of the pilots in the implementation phase. This could be funded through the training contract currently under development by DDS. Once implemented, self-advocates should be included as consultants to individuals who are interested in participating in the waiver.

**Goal 2. By July 1<sup>st</sup> 2008, there is a Cooperative Transition and Employment Unit located in the Department of Developmental Services (DDS).**

**Recommendation #3: The State Council will ask state agencies like DDS, Departments of Rehabilitation (DOR) and Education (DOE) to put funding together to help people with developmental disabilities and their families figure out what to do after high school.**

*Strategy #3.1 State agencies that serve individuals with developmental disabilities (e.g., Departments of Developmental Services, Education, Rehabilitation, Mental*

*Health) will conjointly encourage the replication of local, countywide, interagency adult transition workgroups throughout the State by July 1<sup>st</sup>, 2008.*

**Description:** In order to support comprehensive transition planning, these State agencies will encourage their local counterparts (e.g., regional centers, local education agencies) to develop transition workgroups (e.g., Orange County Adult Transition Task Force). Collaboration is the key to promoting effective and efficient use of services and supports for transition-aged youth with developmental disabilities. Best practices indicate that counties or other defined geographic entities operate an adult transition task force comprised of individuals with disabilities and family members, as well as representatives from support agencies, service providers and advocacy groups. Monthly meetings should be held to share resources and programming opportunities, as well as to discuss and addresses systems issues. Specific workgroups can be formed so that agencies can work together to develop solutions and improved services for individuals with disabilities.

*Strategy #3.2 Develop an Interagency, Cooperative Transition and Employment Unit at the Department of Developmental Services by July 1<sup>st</sup>, 2008.*

**Description:** Modeled after the Cooperative Service Programs in the Department of Rehabilitation, it would be jointly funded by the Departments of Developmental Services, Education, Rehabilitation, and Mental Health. The unit would provide or fund training throughout the state as well as dissemination of best practices and materials (in multiple languages). The Unit would also develop and maintain a website modeled after or connected to the Network of Care. Information and links regarding transition, employment, postsecondary education and training, and community living would be available. In addition, it would have the ability to fund innovative, collaborative transition planning efforts throughout the state. Finally, the Unit would be responsible for: (1) monitoring and evaluating local interagency transition planning, services and supports; and (2) promoting replication of best practices in regional center services that support integrated employment and community participation; and (3) maintaining a registry of peer mentors (e.g., individuals with developmental disabilities and family members) who can provide technical assistance. Strong consideration should be given to hiring an individual with a developmental disability to lead this unit. The need for comprehensive, individualized transition planning will become even more acute in the next ten years due to the increase in individuals with autism<sup>17</sup> served by regional centers. The most current data compiled by DDS (March 07) reveals a net increase over the previous quarter of 886 persons diagnosed with autism, for a total of 33,695 persons. The majority of those individuals are under the age of 18 and individuals with autism now make up eighteen percent of the total served by regional centers (as indicated by the CDER assessment).

*Strategy #3.3 Strengthen interagency transition planning by July 1<sup>st</sup>, 2008.*

**Description:** Develop legislation that requires an interagency planning review process for all transition-aged youth (14-21) who use regional center services. The

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<sup>17</sup> The Blue Ribbon Committee on Autism will be providing some additional recommendations on transition in the Fall of 2007.

planning team would include Regional Centers, the Departments of Rehabilitation, Education, Employment Development, and Mental Health Services as appropriate. As requested by the individual planning team, local representatives of all agencies would sign off as having participated in the development of, offered services as appropriate for, and reviewed the comprehensive transition plan developed for the youth. In addition, Individual Education (IEP) and Program (IPP) Plans would be required to cross-reference and complement each other starting at age 16. The plans would: (1) guide the development of transition curricula that focuses on the individual's general career goals and general skills needed for employment and community participation; and (2) include transportation planning (e.g., mode, frequency, cost, and payment for transportation). Finally, the legislation would require the development of a statewide, peer-mentoring program that provides information and mentoring to youth with developmental disabilities and their families about the many adult living and working options available in most communities. The outcome of this legislative mandate would be that the first day after completing school looks like the last day of school. Individuals have the same jobs, community activities, and support staff.

*Strategy #3.4 Additional positions for a transition specialist and peer advocate in DDS funded Family Resource Centers (FRC) by July 1<sup>st</sup>, 2008. Description:* At present, California's FRCs are funded by DDS to provide families of infants and toddlers (birth to 36 months at risk of or with developmental delays and disabilities) with access information about early intervention services. This would expand those services to include access to information, self-advocacy training and peer support (by individuals with developmental disabilities) support that is language and culturally appropriate for transition aged (14-21) youth and their families.

*Strategy #3.5 Expand access to and opportunities for postsecondary education by July 1<sup>st</sup>, 2008. Description:* Develop a strategic alliance between the DDS Cooperative Transition and Employment Unit, the Governor's Committee and the California Consortium for Postsecondary Education Opportunities for People with Developmental Disabilities. At present, there are limited opportunities for adults with developmental disabilities who want to pursue postsecondary education. The goals of the alliance would be to expand opportunities through: (1) researching available programs and resources in California; (2) creating a website to disseminate resource information; and (3) developing mechanisms of collaboration between the Departments of Education, Rehabilitation, Developmental Services and higher education; (4) providing concrete recommendations for how to expand access to and opportunities for postsecondary education; 5) implementing such recommendations to achieve expanded participation; and 6) tracking the results of the above efforts.

*Strategy #3.6 Provide a legislative remedy to remove disincentives for California Community Colleges to establish postsecondary programs for students with developmental disabilities by July 1<sup>st</sup>, 2008. Description:* At present, there are a number of funding disincentives for establishing Community College programs. Several legislative solutions are possible: (1) establish a separate DDS vendor

code for on-campus programs that includes allowance for rate increases based on Community College COLA's; or (2) establish a concurrent funding mechanism that allows the use of both Community College and Regional Center funding.

**Goal 3. By July 1<sup>st</sup> 2008, The State Council will announce a 5-year employment initiative for Californians with developmental disabilities.** The intent of this announcement is to inform the public of a series of incentives for employers, providers, communities, and people with developmental disabilities in expanding opportunities for employment and community participation. Recommendations and strategies related to the initiative are as follows:

**Recommendation #4: The State Council will work with its State Public Agency partners and all employers to hire more people with disabilities.**

*Strategy #4.1 Establish an Employment Initiative and Community Participation Advisory and Accountability Council by July 1<sup>st</sup>, 2008. Description:* The Department of Developmental Services' Consumer Advisory Committee (CAC) or People First of California could be approached to serve in this capacity. This Council would be authorized to provide public information, analysis and recommendations regarding progress on the employment and community participation initiatives that result from the SB 1270 report.

*Strategy #4.2 Develop a Statewide Plan to Increase Public Sector Employment by July 1<sup>st</sup>, 2008. Description:* The Council will work with the Governor's Committee and the Workforce Investment Board to develop a strategic plan to increase public sector employment over current baseline by 25% during the course of the five-year initiative. It will focus on developing a step-by-step plan for all major State agencies to establish and meet short and long-term employment goals. In addition, The Council will also collaborate with the Governor's Committee on its goal to make the State a Model Employer for People with Disabilities. The Council will join the coalition of partners planning a Fall 2007, two-day state training summit and career fair for people with disabilities seeking state employment.

*Strategy #4.3 Develop an Incentive for Public Agencies by July 1<sup>st</sup>, 2008. Description:* One of the consistent barriers to public sector employment for individuals with disabilities in California is budget constraint. Through legislative action, the State would establish a pilot project that offers an incentive to public entities. The legislation would create a pool of funds that could be used to reimburse a public entity 40% of first year wages of up to \$6,000.

*Strategy #4.4 Expand Incentives to Increase Private Sector Employment by June July 1<sup>st</sup>, 2008. Description:* In order to expand incentives for hiring individuals with disabilities, legislation would be developed to provide a State tax credit for private sector employers similar to the federal Work Opportunity Tax Credit.

The initiative would also include legislation that establishes a five million dollar fund to be used for a dollar-for-dollar State match to funding provided by public and private agencies and organizations. This ten million dollar total match financing would be used to fund the following recommendations and strategies:

**Recommendation #5: Help individuals who have good ideas about work/job services or community services and people with developmental disabilities who want to start their own business.**

*Strategy #5.1 Fund Pilot Programs that Test Innovative Employment, Education, and Community Participation Services and Supports by December 31<sup>st</sup>, 2008.*

**Description:** In collaboration with the Governor's Committee, the State Council will administer a three million dollar program development fund for the establishment of innovative approaches to integrated employment, community participation, and transition services. Priority will be given to projects that are customized to meet diverse cultural and language needs as well as those that use public or alternative methods of transportation. This would provide additional start-up funding to the 2006-2007, three million dollar allocation from DDS to all regional centers for integrated services and supports.

*Strategy #5.2 Provide financial and technical support for self-employment, micro-enterprise and entrepreneurship by December 31<sup>st</sup>, 2008.*

**Description:** Two million dollars of the employment initiative will be used to develop a start-up fund to be administered by Regional Centers in collaboration with local Area Boards. In order to be eligible for a start-up, low or no interest loan (up to \$10,000), applicants must complete and present a business and marketing plan. Applicants will be encouraged to seek consultation from self-employed individuals with developmental disabilities as well as local small business development centers. Initiative funding may also be used to provide small business consultation to potential applicants or individuals who have been awarded a loan. Start-up loan payback terms would be linked to criteria established upon review of the business and marketing plan. Funds received through loan payback would be deposited in the loan fund.

*Strategy #5.3 Support AB 816 and SB 446 if amended to allow developmental service agencies to apply for funding grants.*

**Description:** These two bills, currently moving through the legislative process, would appropriate five million dollars to be used for grants to support the development of micro enterprises. This program would be administered by the Department of Business, Transportation and Housing and grants would be in the range of fifty to one hundred thousand dollars. At present, the draft legislation includes workforce investment boards, community colleges, and economic development agencies. If amended, it would include regional centers and vendored service providers.

*Strategy #5.4 Support for changing Department of Rehabilitation service codes.*

**Description:** At present, service codes do not allow funding for support staff (e.g., attendants) needed by individuals who start micro enterprises. The State Council will support legislation to modify or add service codes as needed.

**Recommendation #6: Make sure support staff get the training they need to do a good job by putting together good trainers from across the state.**

*Strategy #6.1 Develop a statewide Workforce Training and Education*

*Collaborative by September 30<sup>th</sup>, 2008.* **Description:** The State Council, in collaboration with the Department of Developmental Services, ARC California College of Direct Support and the Governor's Committee will establish a collaborative of major public and private agencies and organizations, individuals with developmental disabilities and advocacy organizations, to develop a strategic plan for training culturally and language competent professionals (direct and indirect support providers) in the field of developmental disabilities. The plan will focus on: (1) building capacity in the workforce to support both employment and community participation for individuals with significant disabilities; and (2) providing consultation (in multiple languages) to both new and current providers who want to be vendored for integrated employment and community participation. The plan will include short and long-term approaches to meeting the challenge. The plan will be supported with three million of the ten million dollar employment initiative.

*Strategy #6.2 Support a legislative appropriation for a wage pass through for*

*direct support professionals by September 30<sup>th</sup>, 2008.* **Description:** The State Council, in collaboration with advocates and service providers, will advocate for a wage increase for direct support professionals working in non-residential services. In order to retain well-trained staff, they must be paid a living wage.

**Recommendation #7: Get the word out about people with developmental disabilities who work and are involved in their communities.**

*Strategy #7 Establish a collaborative, statewide media campaign regarding*

*employment and community participation for people with disabilities by September 30<sup>th</sup>, 2008.* **Description:** In partnership with the Department of Developmental Services, the Health and Human Services Agency, Governor's Committee and the California Health Incentives Improvement Project (CHIIP), the State Council will administer a statewide media campaign with guidance from a stakeholder advisory committee (e.g., individuals with developmental disabilities, families, regional centers, advocates, service providers, Governor's Committee). This effort will be funded by one million, seven hundred and fifty thousand of the ten million dollar employment initiative. The focus of the campaign will be on developing media to raise awareness regarding employment (e.g., Employer Report Card) and community participation (using actors with developmental disabilities) for both the community and developmental service professionals. It is essential to enhance the public perception of people with developmental disabilities as good neighbors, co-

workers and members of the community. In addition to the media awareness campaign, funding will be used to develop and support a clearinghouse of materials regarding best practices in employment and community participation for people with developmental disabilities. The clearinghouse will be online and include an electronic newsletter, and listserv. Also, funding will be used to: support a consumer strand at the annual New Day Conference; local conferences for families (e.g., Congresso Familiar) and employers in multiple languages; and, a summit meeting one year after the completion of the SB 1270 recommendations to assess progress.

In addition, the five-year employment initiative would include the following recommendations regarding waivers and legislation:

**Recommendation #8: For people who work and get SSI, let them keep more of the money they earn and health benefits.**

*Strategy #8 Develop a request to the Social Security Administration (SSA) and the Centers for Medicare and Medicaid Services (CMS) for a ten year "hold harmless" statewide demonstration for CA SSI recipients and/or SSDI beneficiaries by March 31<sup>st</sup>, 2008. Description:* The State Council in collaboration with the World Institute on Disability and the Governor's Committee will work with the Health and Human Services Agency, the Department of Developmental Services and the Department of Health Services (Medi-Cal/IHSS) to develop a waiver request for the Governor's approval and submission to SSA and CMS. Core design elements will include:

- *An SSI monthly, earned income disregard equal to the current, indexed Substantial Gainful Activity (SGA) levels (annually indexed by SSA, \$900 per month in 2007).*
- *Monthly earned income above SGA through statewide pilot of a monthly 1:4 earned income disregard waiver for SSI recipients.*
- *A significant raise in SSI recipient asset level restrictions for demonstration purposes (e.g., Florida has an SSA approved asset level waiver of \$10,000 and allowed to remain in place for demonstration participants after the term of the demonstration (hold harmless).*
- *Accessible, expert Social Security and CA social services work incentives staff available throughout the demonstration.*

Demonstration goals include: (1) simplify the rules for all SSI low wage earners; (2) integrate the rules for Social Security disability beneficiaries seeking higher levels of self-sufficiency; and (3) seamless access to health coverage when working or not working. SSA has used pilots of waivers (e.g., a reduction of SSI benefits by \$1 for every \$4 instead of the current \$2 of earnings in excess of \$65) to determine their effects on employment and the use of SSI and other public benefits. However, pilots have typically been used in studies with small numbers of participants. This pilot would provide SSA with the numbers of participants needed to make definitive impact statements.

**Recommendation #9: Let Regional Centers pay for services that help people find and keep jobs and get out in the community to do things like everyone else.**

*Strategy #9.1 Develop a vendor category titled Integrated Work and Community Services by June 30<sup>th</sup> 2008.* **Description:** This vendor category would provide individualized instruction and support services in natural environments that reflect the individual's lifestyle, culture, language and spiritual preference and that enable adults with developmental disabilities (18 and above) to: (1) achieve and maintain integrated, community employment (to include volunteer); and (2) to increase and maintain their independence in life activities integral to an adult lifestyle such as recreation and leisure pursuits, continuing education, interpersonal relationships, community access, and civic responsibilities.<sup>18</sup> Legislation would be needed to amend Title 17 with this additional vendor category. Rates would be locally determined through negotiations between regional centers and service providers.

*Strategy #9.2 Pursue changes in purchase-of-service, vendorization, and program design to expand employment and community participation options by June 30<sup>th</sup> 2008.* **Description:** Legislation would be required to amend current regulations to: (1) allow for the creation of Supported Employment (SEP) groups of 2 people; (2) define SEP "stabilization" at 40% rather than 20% for those individuals who need greater on-going support; (3) allow the Department of Developmental Services and Regional Centers greater flexibility in providing initial funding for supported employment when individuals with significant disabilities do not meet DOR criteria; (4) add more flexibility into Independent Living Services (ILS) regulations to allow for supporting people in the community and add capacity to provide ILS services that are reflective of the individual's lifestyle, culture, language and spiritual preference; (5) reduce systemic/funding barriers that currently do not permit individuals living in licensed homes from working or volunteering during non-traditional hours (e.g., evenings, weekends); and (6) allow regional centers purchase-of-service to pay for transportation for individuals to and from their jobs in the community when necessary.

*Strategy #9.3 Implement additional statutory, regulatory and/or policy changes that will increase local capacity for providing individuals with more opportunities for integrated employment and community participation.* **Description:** Coordinated by the State Council on Developmental Disabilities, a stakeholder group including individuals with developmental disabilities, service providers, regional centers and the State Council will convene to identify barriers in the current system of adult day services and supports that prevent individuals from pursuing their goals of higher earnings and greater community participation. The objective of the group will be to: (1) identify practical strategies (including funding mechanisms) that eliminate identified barriers and increase opportunities for individuals to earn more money

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<sup>18</sup> Department of Developmental Services (1987). *Integrated Work and Community Services (IWCS) Policy* (CSD-87-2).

and spend more time participating in community activities; (2) address issues and develop strategies for reducing the social isolation that can occur when people spend more time in integrated settings; and (3) compile a registry of peer mentors who can provide technical assistance to service providers who want to expand opportunities for integrated employment and community participation.

*Strategy #9.4 Commission a report (e.g., University Centers of Excellence for People with Developmental Disabilities) to be completed by December 31<sup>st</sup>, 2008 examining the impact of reducing or eliminating the use of sub-minimum wages paid to some Californians with developmental disabilities. **Description:*** The study should discuss the potential impact on: economic and social benefits to workers with developmental disabilities; availability of jobs for workers with developmental disabilities; employers and providers of work support services or training; costs and/or savings to the state General Fund; as well as, options and strategies for eliminating or limiting use of sub-minimum wages. It is also important that the study determine what resources are necessary to assure that individuals would not experience reduced employment opportunities, reduced earnings, or restrictions of their individual rights if the use of the certificate is reduced or discontinued in California. Many people in the Stakeholder Workgroup, and others who participated in the community input sessions, believe that the elimination of sub-minimum wages is a fundamental civil rights issue and that increasing the earning potential of people with developmental disabilities will promote dignity, reduce reliance on publicly-funded services, and expand the opportunities for individuals to make choices in all the other areas of their lives. However, others are concerned that workers with developmental disabilities would experience reduced employment opportunities and/or reduced earnings and that such a shift could adversely impact service providers and employers as well. The final report should include input and comment from system stakeholders prior to finalization. The report described in this recommendation could assist policymakers in determining the best course to achieve wage parity for workers with developmental disabilities. This study will be funded by \$250,000 of the ten million dollar employment initiative.

*Strategy #9.5 Establish a State Department of Coordination for Human Services Transportation by June 30<sup>th</sup> 2008. **Description:*** This Department would be charged with the responsibility of developing a coordinated, human services transportation system throughout the state. Gas tax revenues and/or the Department of Transportation would provide funding for this effort in collaboration with the Governor's Committee. The Department would also be responsible for seeking and supporting innovations in transportation such as: (1) a cooperative transportation system coordinated by local Volunteer Centers; and (2) developing a statewide, vehicle acquisition program for individuals with disabilities similar to the Federal 5310 program.

**Goal 4. By July 1<sup>st</sup> 2008, there is a statewide system for collecting and reporting information about integrated employment and community participation.** We assume that with greater access and opportunities, more individuals including individuals reflecting the diversity of California, will choose integrated community employment and participation. In order to know whether or not this is occurring, there must be a way to measure where we are now and changes over time.

**Recommendation #10. Keep track of the work/employment situation of people with developmental disabilities and how they are involved in social and recreational activities in their communities.**

*Strategy #10.1 Reconvene the SB 1270 workgroup to develop core components of a Statewide Tracking System of Employment and Community Participation Demographics and Outcomes by July 1<sup>st</sup>, 2007.* **Description:** The SB 1270 stakeholder workgroup in collaboration with DDS will be asked to: (1) establish quality indicators and measures; (2) identify appropriate data sources, which include demographic information such as race/ethnicity and primary language; and (3) complete its work prior to implementation of the statewide tracking system on July 1<sup>st</sup>, 2008. In addition, the workgroup will be asked to: (1) provide advice and recommendations regarding implementation of the SB 1270 recommendations; and (2) sponsor ongoing employment forums throughout the State.

*Strategy #10.2 Implement a Statewide Tracking System of Employment and Community Participation Demographics and Outcomes by July 1<sup>st</sup>, 2008.* **Description:** Data elements regarding employment (e.g., number of hours worked per month, gross monthly earnings, level of integration, employment categories, employer, transportation type) and community participation (e.g., type and frequency of participation, level of integration) should be added to the Client Development Evaluation Report (CDER) or another existing data collection system (e.g., Employment Services, SANDIS, National Core Indicators). Data will be aggregated by the Department of Developmental Services (DDS) and reported (e.g., statewide, by regional center, metropolitan statistical area) on an annual basis.

*Strategy #10.3 Implement the Regional Center performance measure regarding employment and community participation by July 1<sup>st</sup>, 2008.* **Description:** At present, Regional Center performance contracts contain outcome measures regarding employment and community participation that are not used because of the difficulty in gathering baseline and subsequent data. The development of the statewide tracking system will support the implementation of those measures.

## Appendices

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## Appendix A Welfare and Institutions Code 4678

4678. (a) The State Council on Developmental Disabilities, in implementing subdivision (b) of Section 4677, and with the support of the State Department of Developmental Services,

- shall convene a stakeholder workgroup on alternative and expanded options for nonresidential services and supports.
- The workgroup shall include persons with developmental disabilities, family members, providers, and other system stakeholders.
- The workgroup shall develop recommendations on how to best achieve all of the following:

(1) The development and expansion of community-based models that provide an array of nonresidential options, including, but not limited to, participation in integrated instructive, social, civic, volunteer, and recreational activities.

(2) The development and expansion of community-based work activities, including, but not limited to, customized employment development, integrated job training, and employer-provided job coaching.

(3) The expansion of work opportunities in the public sector.

(4) The increased utilization of existing models, including, but not limited to, self-directed services, vouchers, family teaching models, existing habilitation, and supported work vendors to facilitate access to nontraditional community-based nonresidential activities.

(5) Strategies to promote and duplicate successful and innovative models developed in California and in other states.

(6) The identification of, and strategies to address, statutory, regulatory, licensing, vendor-related, funding and other types of barriers to achieving the goals identified in this act, including strategies to improve individualization of services and supports by increased flexibility in design, staffing, and compensation.

(b) By May 1, 2007, the State Council on Developmental Disabilities shall submit recommendations from the workgroup to the Governor and appropriate committees of the Legislature and may, thereafter, incorporate subsequent recommendations into its state plan developed pursuant to Section 4561.

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## Appendix B Stakeholder Advisory Group

First Name	Last Name	Stakeholder Affiliation
Neal	Albritton	Disability Organization
Michelle	Alford-Williams	State Department
Bill	Allen	Facilitator/Staff
Tony	Anderson	Disability Organization
Margaret	Anderson	State Department
Dion	Aroner	Service Provider
Bob	Baldo	Disability Organization
ThoVinh	Banh	Disability Organization
Ricardo	Barba	Service Provider
Margaret	Barcelo	Individual with a Disability
Julie	Barnes	Co-Sponsor
Sherry	Beamer	Service Provider
Sascha	Bittner	Individual with a Disability/Family SCDD Member
Claudia	Bolton	Facilitator/Staff
Phil	Bonnet	Co-Sponsor
Dan	Boomer	State Department
Wendy	Byrnes	Individual with a Disability Parent/Family
Rachel	Chen	Individual with a Disability Parent/Family
Mike	Clark, Ph.D.	Facilitator/Staff
Cindy	Claus-John	Co-Sponsor
Melanie	Cleveland	Individual with a Disability Parent/Family
Terry	Colborn	Disability Organization
Kim	Coleman-Bowie	Service Provider

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First Name	Last Name	Stakeholder Affiliation
Michael	Collins	Disability Organization
Peggy	Collins	State Legislature
Michael	Cooke	Disability Organization
Lisa	Cooley	Individual with a Disability/Family SCDD Member
Theresa	Cooper	Individual with a Disability Parent/Family
Melissa	Corral	Facilitator/Staff
Eileen	Cubanski	State Legislature
Denyse	Curtwright	State Department
Terri	Delgadillo	State Department
Diana	DeRodeff	Service Provider
Jacque	Dillard-Foss	Disability Organization
Shirley	Dove	Disability Organization
Dale	Dutton	Individual with a Disability Parent/Family
Janet	Eaton	Facilitator/Staff
Cindy	Escott	State Department
Tammy	Eudy	Individual with a Disability
Mike	Everson	Facilitator/Staff
Eileen	Falvey	Individual with a Disability Parent/Family
Tom	Fambro	Individual with a Disability
Bob	Farran	Service Provider
Maureen	Fitzgerald	Disability Organization
Stephanie	Fountain	Disability Organization
Ellen	Goldblatt	Disability Organization
Marcy	Good	Individual with a Disability/Family SCDD Member
Mark	Gordon	Individual with a Disability

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First Name	Last Name	Stakeholder Affiliation
Sandra	Hamel	State Department
Natalie	Hannibal	Facilitator/Staff
Dwight	Hansen	Disability Organization
Robin	Hansen, MD	Federal Partner
Monique	Harris	Individual with a Disability
Lee	Hawn	Disability Organization
Dr. Katharine	Hayward	Federal Partner
Robyn	Heebink	Facilitator/Staff
Tom	Heinz	Service Provider
Laurie	Hoirup	Facilitator/Staff
Carlene	Holden	Disability Organization
Bob	Irvine	Service Provider
Julie	Jackson	Facilitator/Staff
Robert	Jacobs, MD	Federal Partner
Gail	Janke	Individual with a Disability Parent/Family
Pam	Jensen	Service Provider
Charlene	Jones	Facilitator/Staff
Clay	Jones	Co-Sponsor
Alan	Kerzin	Facilitator/Staff
Lori	Kotsonas	Service Provider
Laura	Larson	Co-Sponsor
Peter	LeDoux	Disability Organization
Michael	Long	Disability Organization
Liz	Lyons	Individual with a Disability
Bryon	MacDonald	Service Provider

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First Name	Last Name	Stakeholder Affiliation
Barbara	Maizie	Disability Organization
Aaron	Markovits	Service Provider
Dr. Steven	Mayberg	State Department
John	Mc Cue	Service Provider
Pat	Mejia	Individual with a Disability Parent/Family
Tracey	Mensch	Individual with a Disability
Steve	Miller	Service Provider
Tom	Montesonti	Co-Sponsor
Dawn	Morley	Facilitator/Staff
Julia	Mullen	State Department
Roberta	Newton	Facilitator/Staff
Hung Gia	Nguyen	Individual with a Disability Parent/Family
Sharon	Nguyen	Individual with a Disability Parent/Family
Anh	Nguyen	Disability Organization
Omar	Noorzad	Co-Sponsor
Sue	North	State Legislature
Marty	Omoto	Service Provider
Kathleen	Ozeroff	Facilitator/Staff
Bill	Pelter	Disability Organization/Facilitator
Steve	Perez	Individual with a Disability Parent/Family
Mark	Polit	Disability Organization
Sierra	Prine	Facilitator/Staff
Sue	Putman	Facilitator/Staff
Olivia	Raynor, Ph.D.	Federal Partner
Teddy Joy	Remhild	Service Provider

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First Name	Last Name	Stakeholder Affiliation
Robin	Rhoades	Facilitator/Staff
Carol	Risley	Facilitator/Staff
Dick	Robertson	Co-Sponsor
Rick	Rollens	Individual with a Disability Parent/Family
Michael	Rosenberg	Facilitator/Staff
Rita	Rubin	Individual with a Disability Parent/Family
Kim	Rucker	Individual with a Disability
Leticia	Ruiz	Individual with a Disability Parent/Family
Missy	Runnels	Individual with a Disability
Will	Sanford	Service Provider
Debbie	Sarmento	Disability Organization
Scott	Shepard	Service Provider
Erik	Skinner	Agency/State Department
Delia	Soto	Facilitator/Staff
Dana	Spear	Facilitator/Staff
Amy	Stahl	State Department
Mark	Starford	Facilitator/Staff
Jules	Stein	Agency/State Department
Jeff	Strully	Service Provider
Tammy	Torum	Disability Organization
Vickie	Vining	Service Provider
Linda	Weiner	Service Provider
Willie	West	Individual with a Disability
Cindy	White	Individual with a Disability
Carole	White	Individual with a Disability Parent/Family

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First Name	Last Name	Stakeholder Affiliation
Anna	Wong	Individual with a Disability Parent/Family
Marcia	Yamamoto	State Department